U.S. Department of Agriculture
WorkLenz User Instruction Manual
Version 4.7

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I. Welcome

Welcome to WorkLenz™ for project portfolio management!

WorkLenz is intuitive and user-friendly, allowing users to quickly and efficiently manage project data. Our unique functionality allows users to use past project data to create estimates for new work - this results in better schedules, better resource allocation and repeatable projects and processes. Users no longer have to start from scratch with each new project.

This training guide is designed to provide a foundation from which users will begin to understand the core concepts and practices of the application and learn to use WorkLenz efficiently. We believe, however, that no written document can entirely take the place of human interaction, and we therefore suggest enlisting the services of the WorkLenz training team.

Attention PMI members! Métier's standard WorkLenz training courses for executives, project managers, users and administrators are recognized as PMI Registered Programs. Métier clients who are both licensed WorkLenz users and PMI members are eligible to earn PDUs through PMI as part of their project management certification process. At the completion of WorkLenz training, you will be given a certificate. The certificate will specify either course number 2034-WLPPM1 for four PDUs or course number 2034-WLPPM2 for seven PDUs. Please retain this certificate for PMI as evidence of your participation.

II. General Overview

Access

WorkLenz is a browser-based application. **Please disable any popup blockers in your web browser prior to using WorkLenz.** Access to the application is granted only to those with authenticated, unique user ids and passwords. Different access levels are set for various personnel. Depending on each user's access level, the interface may vary from this guide to better accommodate work requirements.

Métier consultants will provide user ids and initial passwords during training, which users will be required to change the first time they login to WorkLenz.

WorkLenz Concepts

Tasking Horizon: When creating a project, users are prompted for information regarding the project's tasking horizon, which is defined as the longest timeframe where tasks can realistically expect to occure according to plan. Métier strongly recommend a tasking horizon of one week.

Churn: Churn is the movement of tasks along the timeline within a tasking horizon. Churn is neither good nor bad; the terminology is simply a way of quantifying the dynamics of a project. WorkLenz collects data on three types of churn: left, right, and down.

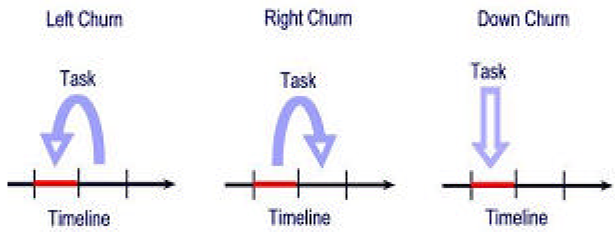


Figure 1: Churn

Left Churn: Tasks that are started or finished in an earlier tasking horizon than planned. These tasks move to the left on the timeline.

Right Churn: Tasks that are started or finished in a later tasking horizon than planned. These tasks move to the right on the timeline.

Down Churn: Unexpected tasks that fall into the current tasking horizon.

The typical tasking horizon used by WorkLenz is one calendar week; any task scheduled to take place during that week that actually starts or finishes outside of that calendar week becomes an instance of churn.
For example, if the task "Peer review design deliverable" is scheduled to begin on Monday, March 21, but actually begins on Friday, March 18 this will be documented as an instance of left churn because it is outside of the estimated start date's calendar week.

Churn is neither good nor bad; the terminology is simply a way of recording the dynamics of a project. The analysis of churn, the investigation of why it occurred and the examination of its relationship to individuals, teams and words within a project identifies how an organization operates and performs in relation to its original plan.

Taxonomy: In WorkLenz, data is stored in a hierarchical structure. This structure has five levels: portfolio, program, project, phase and task. The phase level has the ability to be *nested*, which allows WorkLenz to accommodate schedules of any depth. This structure forms the backbone of the *taxonomy*, the attributes that make data comparable across the portfolio.

WorkLenz Interface

The WorkLenz interface is designed to be simple, familiar and easy to use. There are two basic page styles users will encounter while using WorkLenz: Summary screens and List screens. Summary screens provide aggregated detail for a specific data item within WorkLenz. List screens are filterable and display a list of data.

The title bar across the top of the screen is consistent throughout the WorkLenz application, except on the initial Splash Screen. Use the title bar area to navigate within the application and quickly access frequently used features.

Figure 2: Title Bar

(A) Title Bar: The name of the user and the current location within the application are displayed for easy reference.
(B) Navigation Tree: Clicking the arrows in the lower right of this gray box will expand the navigation tree. This tree shows the current location within the WorkLenz hierarchy. Click on any of the links in this gray box to go directly to that area within WorkLenz.
(C) List Buttons: Click any of these round list buttons to go to the appropriate list page.
(D) Utility Menu: Access frequently used areas of the application through these hover-over menus.

Splash Screen

The Splash screen is the first screen seen after logging in to WorkLenz. The four major areas of this screen are detailed below:

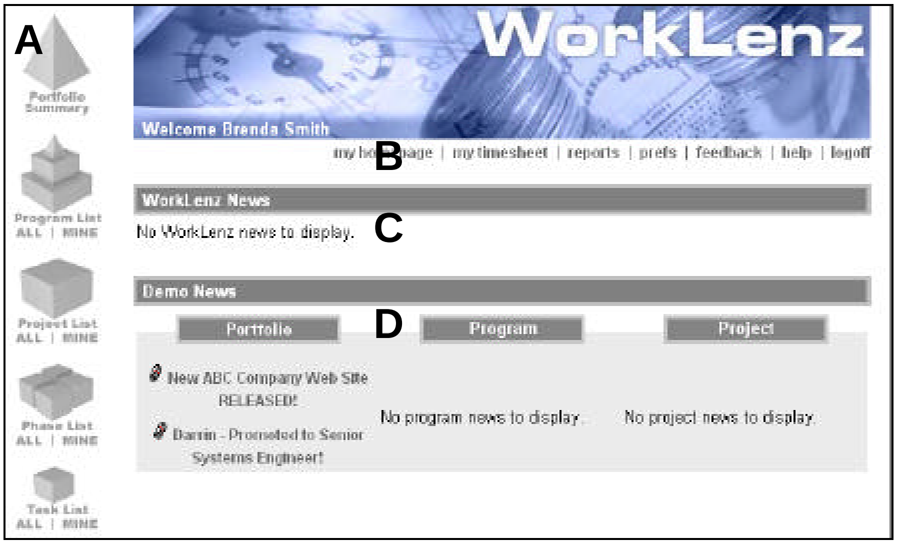


Figure 3: Splash Screen

(A) List Buttons: Graphics displayed vertically along the left side of the screen link to list screens (portfolio, program, project, phase and task). Users have the option of viewing either all items associated with that particular level, or only those to which they are assigned, via the *mine/all* toggle. Below is a list of the five levels of the WorkLenz hierarchical structure.

i. Portfolio level
ii. Program level
iii. Project level
iv. Phase level
v. Task level

(B) Function Bar: Frequently used aspects of the application such as the user-defined home page, preferences, task list time entry, feedback, help and logging off are easily accessible from this area.

(C) WorkLenz News: This feature provides updates and information about WorkLenz. Click on any of the headlines to display the entire article.

(D) News: Portfolio, program and project level headlines are displayed here. Click on any of the headlines to display the entire article.

Summary Screens

Aggregate information detailing the status of the portfolio, program, project and phase levels, is displayed on the respective summary screens.

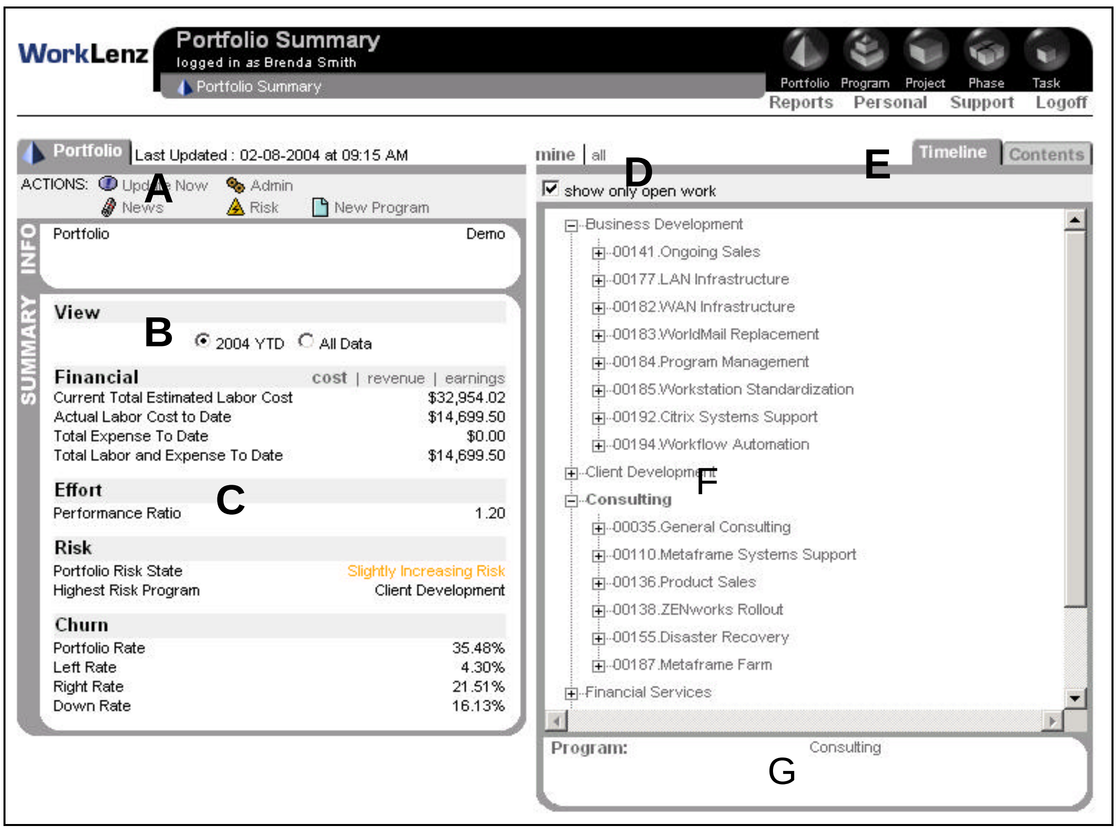


Figure 4: Portfolio Summary Screen

(A) Action Bar: Buttons located directly below the level identifier tab can be used to execute common functions associated with that screen, including:

Figure 5: Project Action Bar

?? The *Update Now* feature is designed to allow users to update performance statistics on demand. The performance statistics are calculated using OLAP (On-Line Analytical Processing), which requires significant resources from the server. Normally, calculations are performed nightly but this feature allows them to run on demand.

?? *View, Edit* and *Delete* commands affect the current level. For example, clicking the *Edit* button from the project summary screen allows the user to edit the attributes of that project.

?? *Risk, Dependencies* and *News* allow the user to assign risks and dependencies or view news stories associated with the current summary level. (News can only be accessed from the *program* and *project* summary screens.)

?? *Notes* launches a popup *Notes Center* that allows WorkLenz users to have a threaded discussion about a particular program, project, phase or task.

?? *New Phase (program, project, phase* or *task)* allows the user to create a new entry one level down from the current summary.

?? *Admin* allows managers and administrators to modify the configuration of the application.

(B) Summary Data View: The radio buttons located directly below the info data allow users to determine the results of the performance statistics. Depending on which choice is selected, the portfolio level performance statistics can either represent *Calendar Year* or *All Data* figures. The *Calendar Year* selection includes all data captured in WorkLenz since January 1st of the current year. The *All Data* selection includes all data captured in WorkLenz since its implementation

(C) Performance Statistics: The left side of each summary screen displays aggregate cost, earned value, effort, risk and churn (deviation from plan) statistics for the levels below. For example, the portfolio summary screen represents a combined status of all programs because the portfolio level is composed of all of the programs in the portfolio.

(D) Filters: Users have the option of viewing either all items associated with that particular level or only those to which the user is assigned via the *mine/all* toggle. Along with the *mine/all* filter, the view can be filtered further by the *show only open* check box. This filter controls the view by displaying only open items.

(E) View Tabs: Tabs are located on the right side of each summary screen. The *timeline* tab displays a simplified Gantt view of the information in each level below the current summary screen. The *contents* tab displays the entries in an expandable tree view list.

(F) Summary Info Tree: Click the down arrows to display all WorkLenz levels relative to the current location. The listings are displayed as hyperlinks to the applicable summary screens. Click on the WorkLenz level to drill down and expand a tree view of the next lowest level.

(G) Select: This section displays a link to the selected level in the tree view. Click on the link to go to the summary screen of the selected level.

List Screens

List screens provide a quick way to navigate through the application, and to see entire datasets at a particular level. List screens can be sorted, filtered, and provide mass editing capabilities.

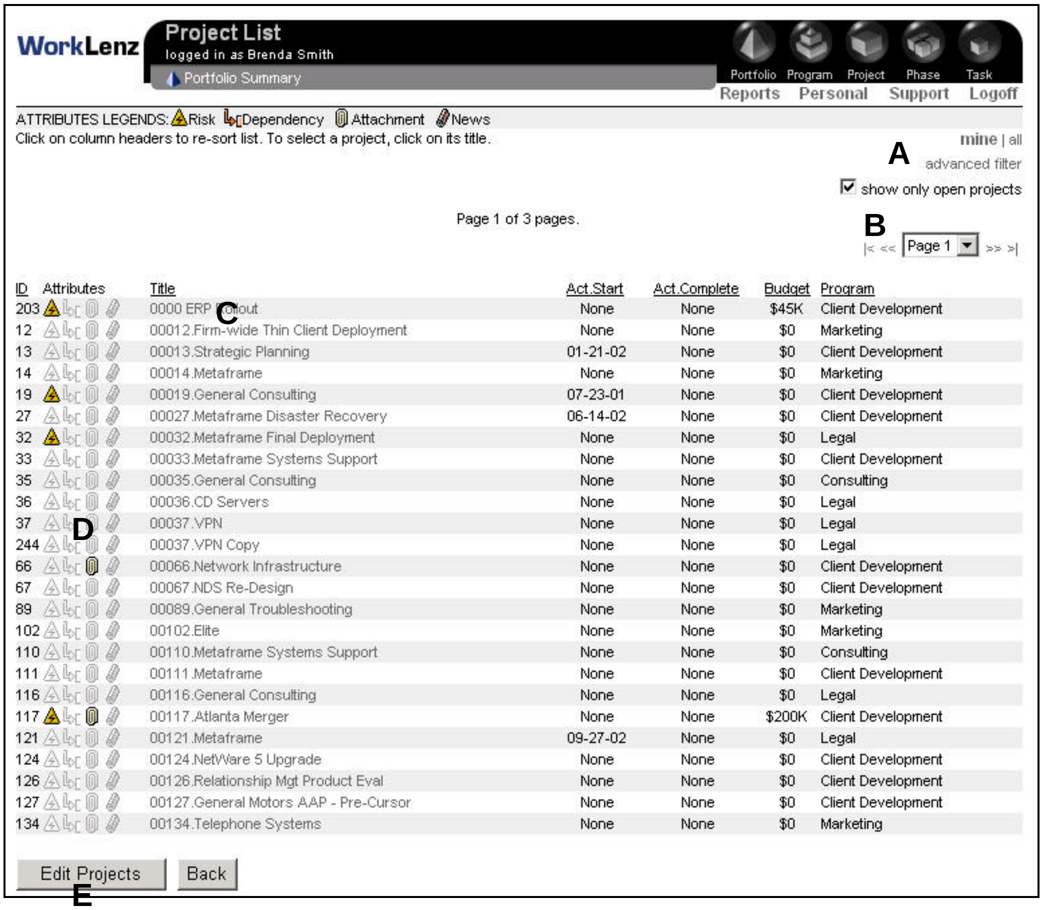


Figure 6: Project List Screen

(A) <u>Mine/All and 'show only open':</u> Lists can also be sorted to either display all items associated with that particular level or only those to which the user is assigned tasks via the *mine/all* toggle. In addition to these filters, the list screens can be filtered further by the *show only open* check box. This filter will display only those items with an open status.

<u>Advanced filter:</u>
WorkLenz has an advanced filter on each list page, allowing the user to filter according to any combination of criteria, including: program/project/phase/task title keyword, custom fields, status, type, category, estimated start/complete dates and actual start/complete dates. In addition, the task list can be sorted further by more attributes, including: assignee, individual/team assigned tasks, risk, notes, action items, churn, dependencies, expenses, attachments and tasks with durations. To use advanced filter, click on the *advanced filter* link. This will launch a popup window where the user can select the filter criteria. Click *submit* and the main window with the list page will refresh with the filtered data. To clear the filter criteria, click the link '*clear filters'* that appears beside the *advanced filter* link once a filter is applied.

(B) <u>Pages:</u> There may be multiple pages of data for a specific level or based on selected filter criteria. Each page displays twenty-five data items. Use the arrows to navigate one page forward or backward. Use the dropdown list to navigate to a specific page.

(C) Sorting: List screens can be sorted by clicking any column header.

(D) Attribute Links: The icons to the left of the list item are attribute links. If an icon is in color, it indicates that the item does have that specific attribute. The user can click on any of these icons to navigate directly to that attribute details for the specific list item. On the graphic above, the attributes shown (from left to right) are risk, dependencies, churn and news.

(E) Mass Edit: Clicking on the “Edit” button will transform the current page into an editable data grid. This allows the user to edit multiple items at one time.

Administration Screens

The administration screens provide access to system configuration areas and advanced features within the application. There are administration screens for the portfolio, program and project levels. The WorkLenz taxonomy can be modified from the portfolio administration area. For this reason, it is important to understand the impact of a change before modifying certain data elements. In most situations, the user will not need to modify the data definitions at the portfolio level. Instead, the administration area will be used to add additional customized data fields, and access features such as Microsoft Project Import/Export and Assessments.

When configuring WorkLenz, the administration screens must be completed in descending order beginning with the portfolio level. For example, a new employee must first be added to the portfolio level before being assigned to an individual project or task. A checklist at each administration level identifies the required information. It is important to eliminate redundancy between variables. Clear and consistent usage across the organization will lead to a higher integrity of data and increased statistical confidence.

Portfolio Administration

Access to the portfolio administration screen may be restricted depending on the user's role within the organization. To access the portfolio administration area, click on the *Admin* link from the action bar on the portfolio summary screen.

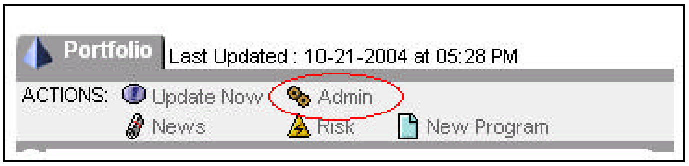


Figure 7: Portfolio Admin Link

WorkLenz provides a checklist in the portfolio administration section in the order in which the data will be entered on each administration screen. Below is an explanation of each type of data that is required:

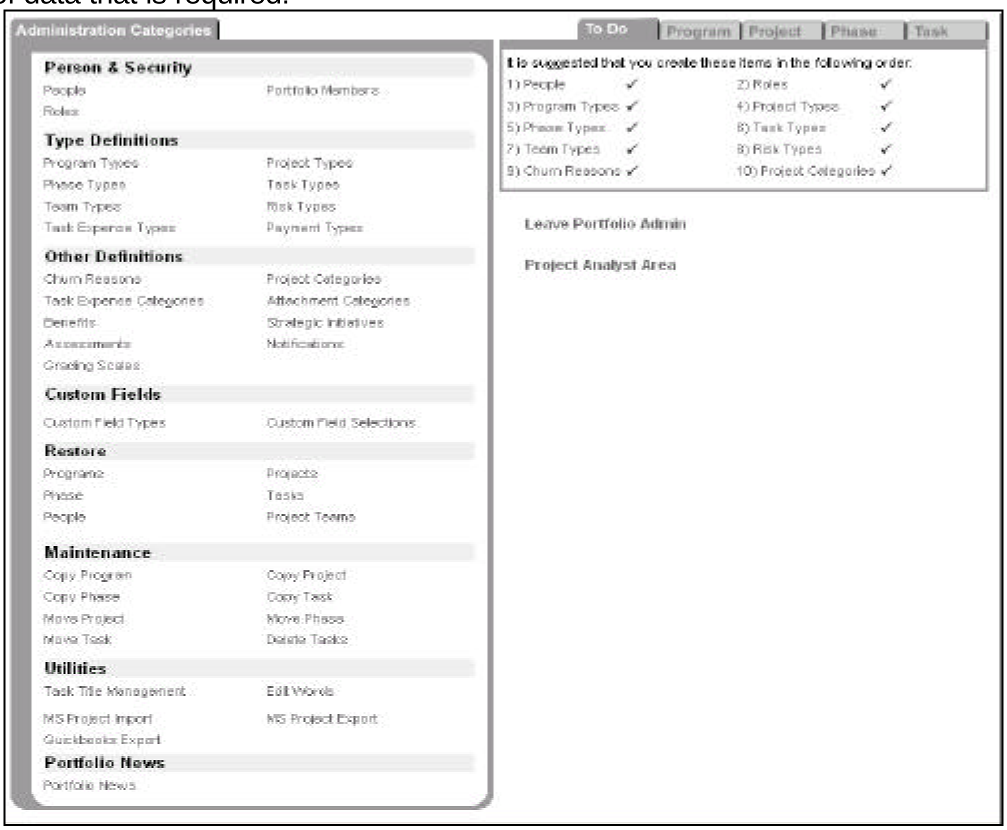


Figure 8: Portfolio Administration Screen

?? People: The people listed in the person list page comprise the entire set of users that WorkLenz will recognize. Only those users identified in this list may access WorkLenz or be assigned to project and tasks. Users can be marked as "deleted" from the person administration screen or set to be inactive.

WorkLenz requires the following information of each user: First Name, Last Name, Title, E-mail, Rate, Cost, User ID, Password, Classification and Person Status. To add a new person to WorkLenz, click the *New Person* link in the top left corner of the portfolio administration *People* menu.

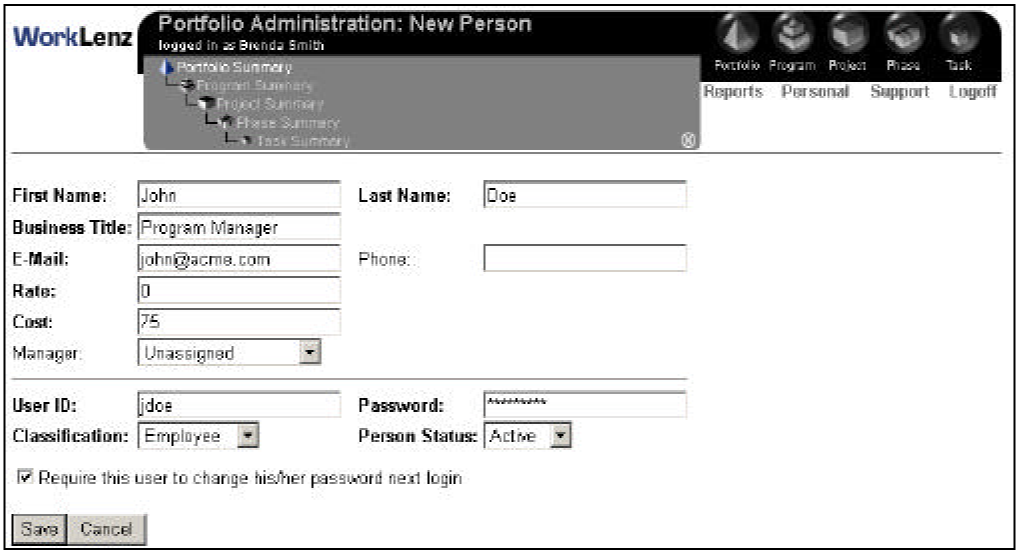
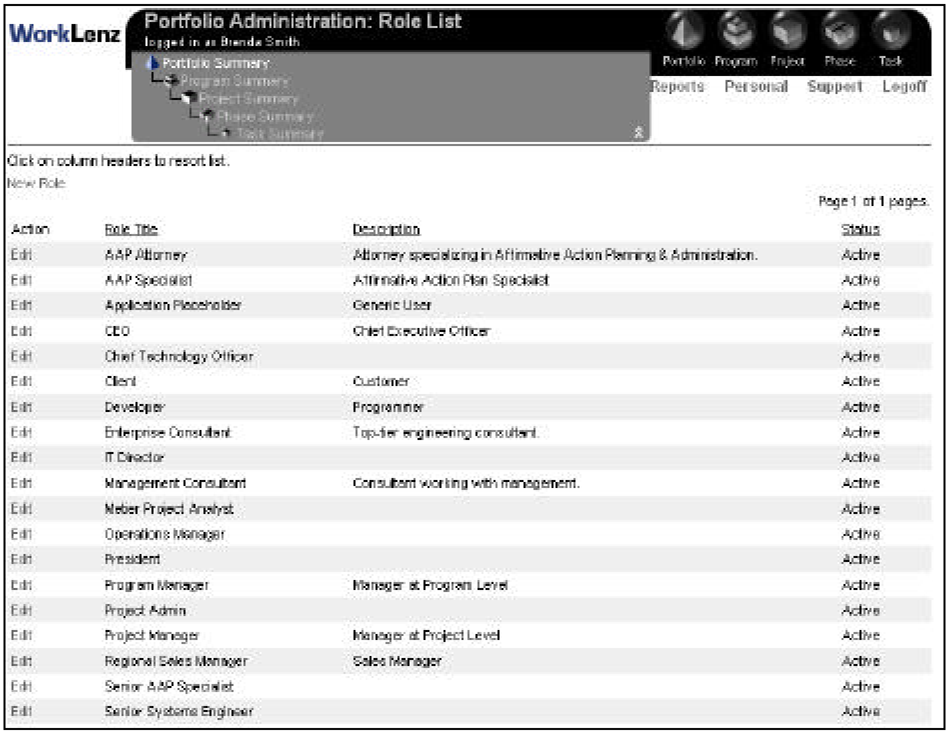


Figure 9: Edit Person Screen

?? Roles: A role defines the specific function a project member will perform within a project. Project members can be assigned one or more roles in each project. For example, a programmer may be assigned the role of “Test Engineer” on one project and “Technical Writer” on another. This allows for the creation of reports which compare how an individual performs in different roles, as well as how certain roles perform across the entire organization. To add a new role, click on *New Role* in the top left side of the page.

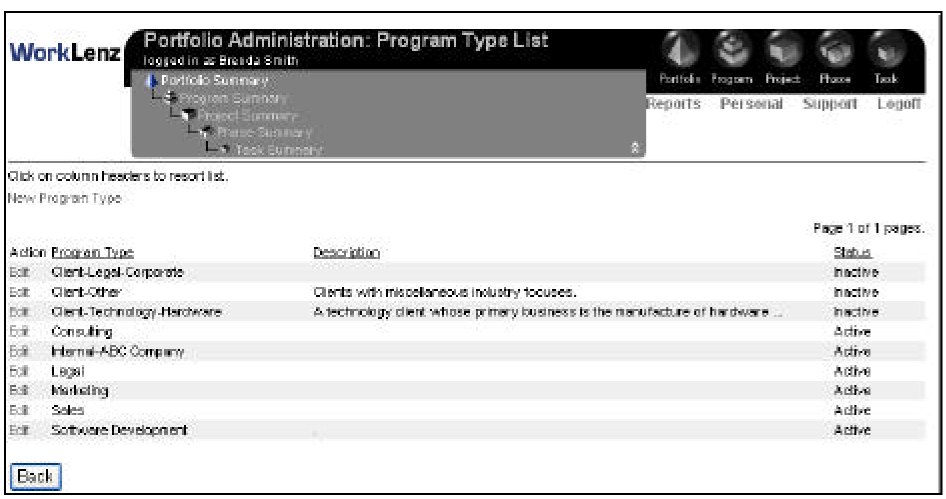
At the portfolio level, this role list comprises all of the possible roles that can be used throughout WorkLenz.



Action	Role Title	Description	Status
Edit	AAP Attorney	Attorney specializing in Affirmative Action Planning & Administration.	Active
Edit	AAP Specialist	Affirmative Action Plan Specialist	Active
Edit	Application Placeholder	Generic User	Active
Edit	CEO	Chief Executive Officer	Active
Edit	Chief Technology Officer		Active
Edit	Client	Customer	Active
Edit	Developer	Programmer	Active
Edit	Enterprise Consultant	Top-tier engineering consultant.	Active
Edit	IT Director		Active
Edit	Management Consultant	Consultant working with management.	Active
Edit	Meter Project Analyst		Active
Edit	Operations Manager		Active
Edit	President		Active
Edit	Program Manager	Manager at Program Level	Active
Edit	Project Admin		Active
Edit	Project Manager	Manager at Project Level	Active
Edit	Regional Sales Manager	Sales Manager	Active
Edit	Senior AAP Specialist		Active
Edit	Senior Systems Engineer		Active

Figure 10: Role List Screen

?? Types (program, project, phase, task, team, risk, expense, payment): Types are attributes used to group similar items together for reporting and analysis. The set of types are defined during the initial WorkLenz implementation process. The types configured at the portfolio level are standardized throughout the system. To add a new type, click *New Type* in the top left of each list page.

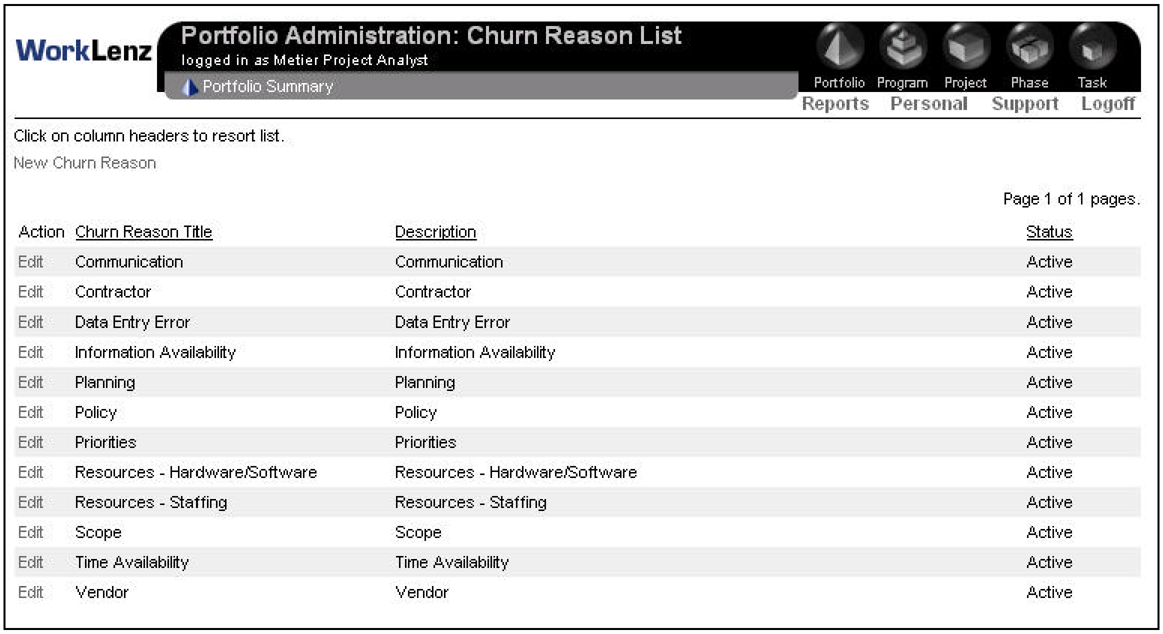


Action	Program Type	Description	Status
Edit	Client-Legal-Corporate		Inactive
Edit	Client-Other	Clients with miscellaneous industry focuses.	Inactive
Edit	Client-Technology-Hardware	A technology client whose primary business is the manufacture of hardware ...	Inactive
Edit	Consulting		Active
Edit	Internal-ABC Company		Active
Edit	Legal		Active
Edit	Marketing		Active
Edit	Sales		Active
Edit	Software Development		Active

Figure 11: Program Type List Screen

?? Categories (project, expense, attachment): Categories are another attribute used to group data throughout the system. These are also configured during the implementation, and any changes will be applied throughout the WorkLenz database. To add a new project, expense or attachment category, click on *New Category* in the top left of each page.

?? Churn Reasons: Churn reasons are explanations of why deviations from a plan occur. If a task experiences churn, the user initiating the churn event will be prompted to choose the reason for the occurrence from a dropdown box. The WorkLenz database is pre-populated with a series of common churn reasons; however, we suggest that the organization tailors these reasons to specifically meet its needs. To add a new churn reason to the database, click on *New Churn Reason* in the top left of the page.



Action	Churn Reason Title	Description	Status
Edit	Communication	Communication	Active
Edit	Contractor	Contractor	Active
Edit	Data Entry Error	Data Entry Error	Active
Edit	Information Availability	Information Availability	Active
Edit	Planning	Planning	Active
Edit	Policy	Policy	Active
Edit	Priorities	Priorities	Active
Edit	Resources - Hardware/Software	Resources - Hardware/Software	Active
Edit	Resources - Staffing	Resources - Staffing	Active
Edit	Scope	Scope	Active
Edit	Time Availability	Time Availability	Active
Edit	Vendor	Vendor	Active

Figure 12: Churn Reason List Screen

?? Strategic Initiatives This field can be used to align a project with a strategic goal. More than one strategic initiative can be added to a project and each can be designated as active or inactive. A project's alignment with a particular strategic initiative is set at the program level. This feature is accessed in the portfolio, program and project administration areas. The results are viewed in the *Details* section of the project summary screen.

?? Benefits WorkLenz benefits function similarly to strategic initiatives. A set of targeted benefits can be configured at the portfolio level. Each project can be associated with one or more benefits. For example, "Reduced Costs" might be a benefit for a program focused on increasing efficiency.

?? News: News items can be created at the portfolio, program and project levels of WorkLenz. The news item will be displayed on the appropriate summary screen, and the splash screen, during the dates selected. To create news, click on the *News* link from the administration area. Create a new news item. Enter a headline and a description (the article). Select dates for which the news will be displayed. Click *Save* to record the news item.

?? Task Title Management: WorkLenz contains a natural language processing (NLP) capability that analyzes every task title. WorkLenz identifies a part of speech for each word, and stores its usage in the database. For example, the task title "Install server at client" would be mapped as:

Install/ VB server/ NN at/ IN client/ NN

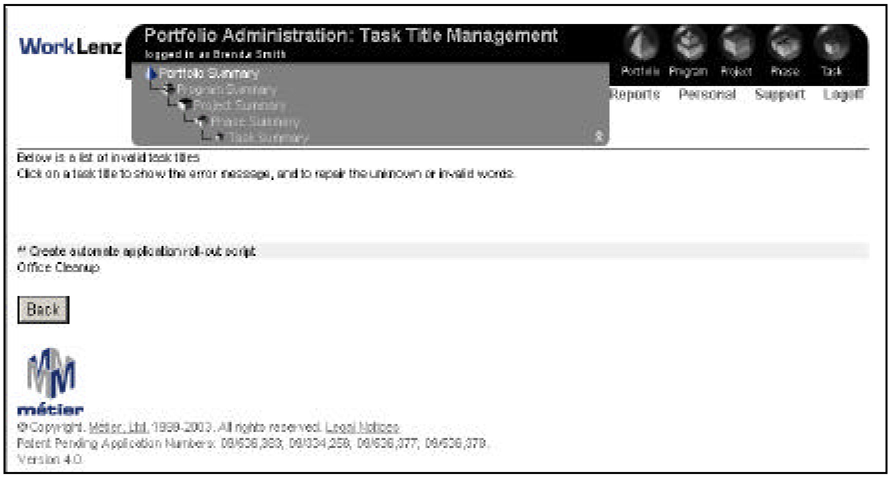


Figure 13: Task Title Management Screen

The task title management page is one of the administrative interfaces for the WorkLenz natural language processing engine. When WorkLenz cannot parse a task title, or encounters unknown words, that task title will appear in the *task title management* area. To access *Task Title Management,* click on the link from the portfolio administration screen. Click on any of the unknown task titles to launch a popup window that will allow the user to rewrite or "fix" these task titles. When rewriting a task title, it is important to include a clear verb and object. If WorkLenz has encountered an unknown word, the user can click "fix" to map the unknown word to its part of speech.

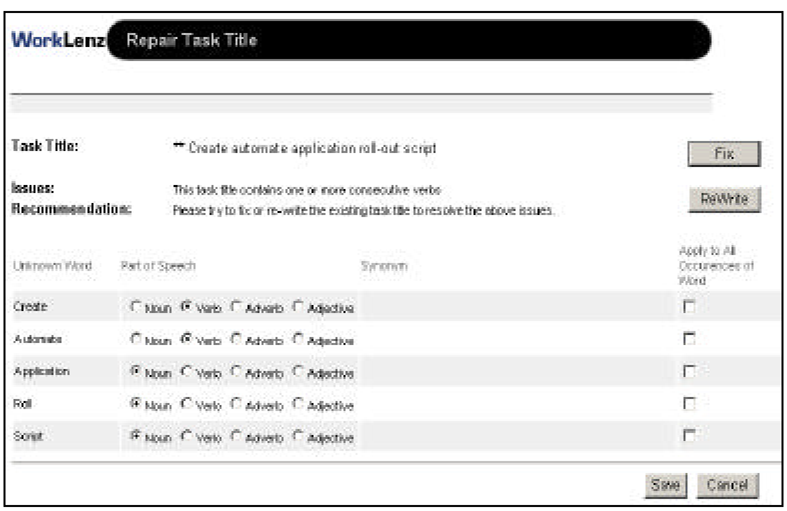


Figure 14: Repair Task Title Screen

?? The second area for NLP administration is the *Edit Words* area, which is also available via portfolio administration. This area provides a list of words that WorkLenz does not recognize. Any changes made to the way a word is interpreted will be applied for each occurrence of that word.

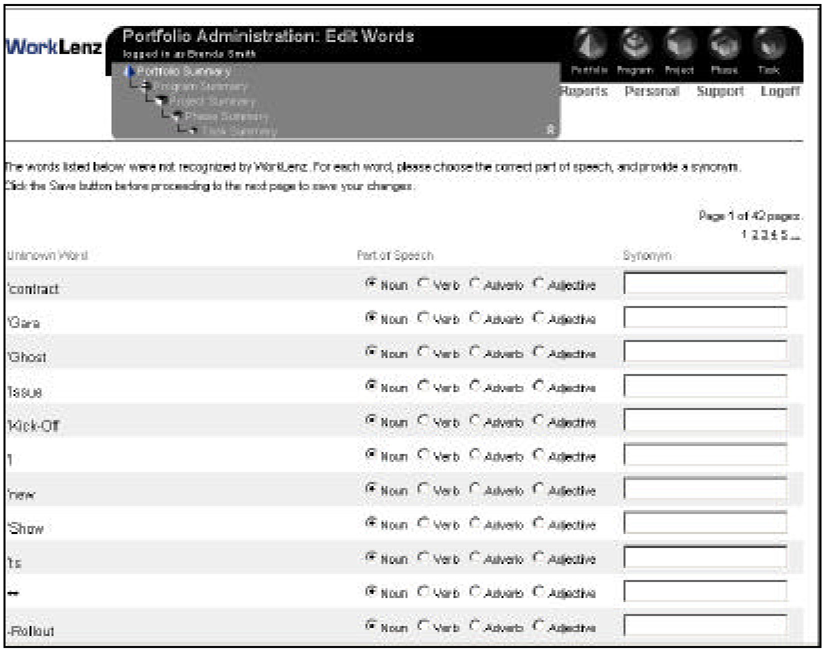


Figure 15: Edit Word Screen

Once the portfolio administration areas have been configured, WorkLenz is ready for use. The section on using WorkLenz will provide important details and tips for using WorkLenz efficiently.

Program Administration

The program administration menu allows for additional customization for a specific program. Settings will affect the designated program and its underlying projects.

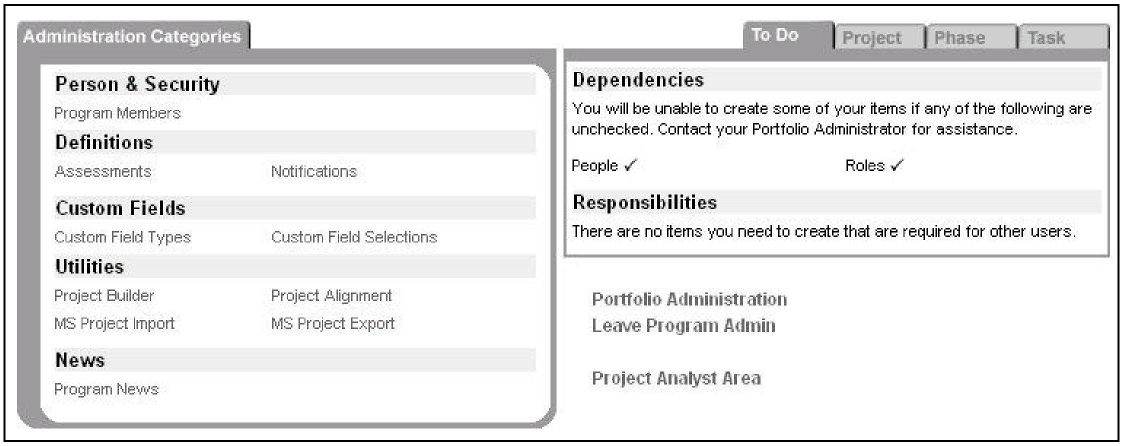


Figure 16: Program Administration

?? Project Alignment: The project alignment area indicates the degree to which projects are aligned with the strategic initiatives and benefits. To set project alignment values for strategic initiatives and benefits, click on the project name under the *Project Alignment* list. Then select the alignment for each strategic initiative or benefit. Projects can have "none", "partial" or "full" alignment with an initiative or benefit.

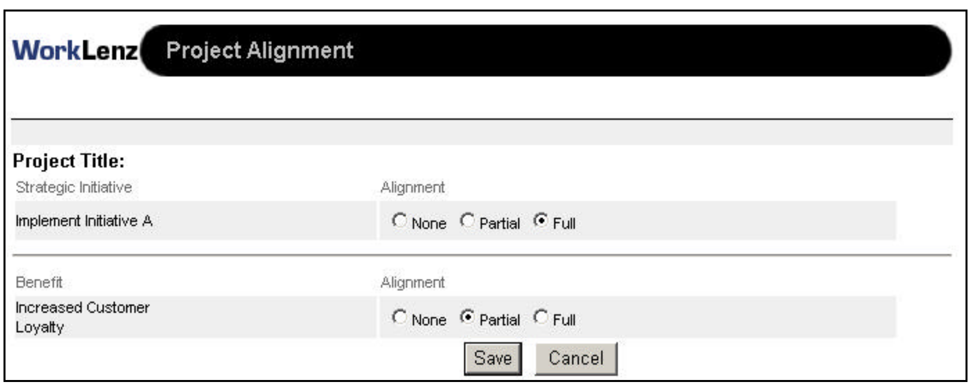


Figure 17: Project Alignment

Project Administration

WorkLenz provides a checklist in the project administration section in the order in which the data will be entered on each administration screen. Below is an explanation of each type of data that is required:

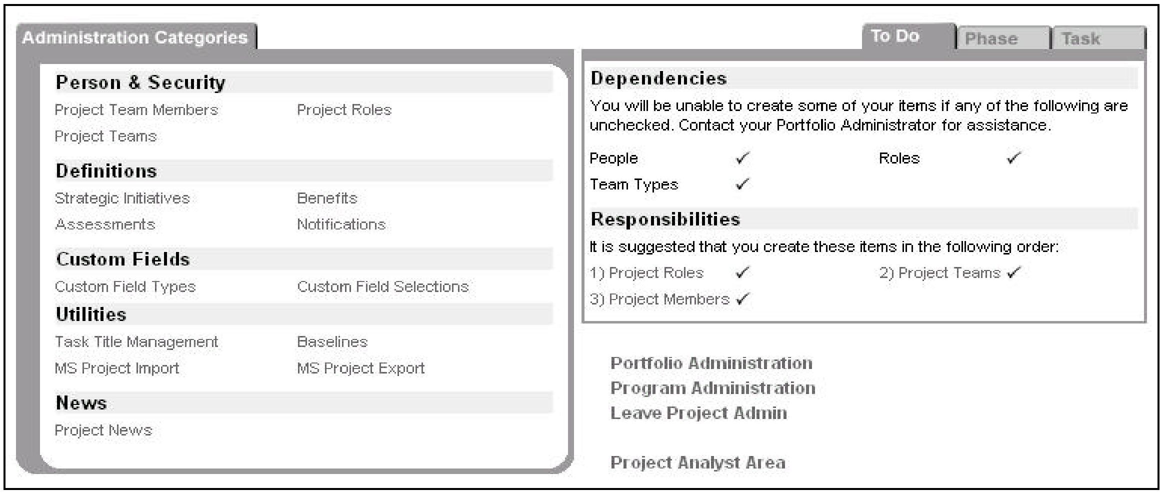


Figure 18: Project Administration

?? <u>Project Roles</u>: Before assigning individuals to a project, project roles must be defined. To add a new project role, click the *New Project Role* link in the top left on the Project Roles page in project administration. Each role is associated with a clearance level that defines the access for a person within a specific project.

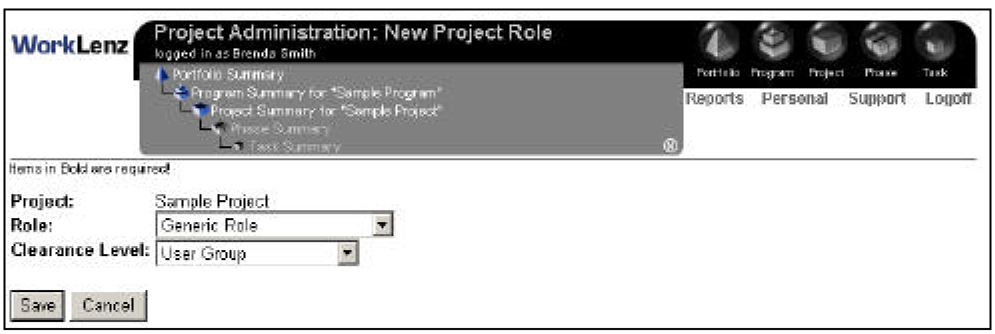


Figure 19: New Project Role

?? Project Teams: Before assigning individuals to a project, project teams must be defined. To add a new project team, click the *New Project Team* link in the top left on the Project Teams page in project administration. Typically, there should be a single project team for each project.

Figure 20: New Project Team

?? Project Team Members: Once project roles and teams have been established, individuals can be assigned to the project. To add a new person to a project team, click the *New Project Team Member* link in the top left on the Project Team Members page in project administration.

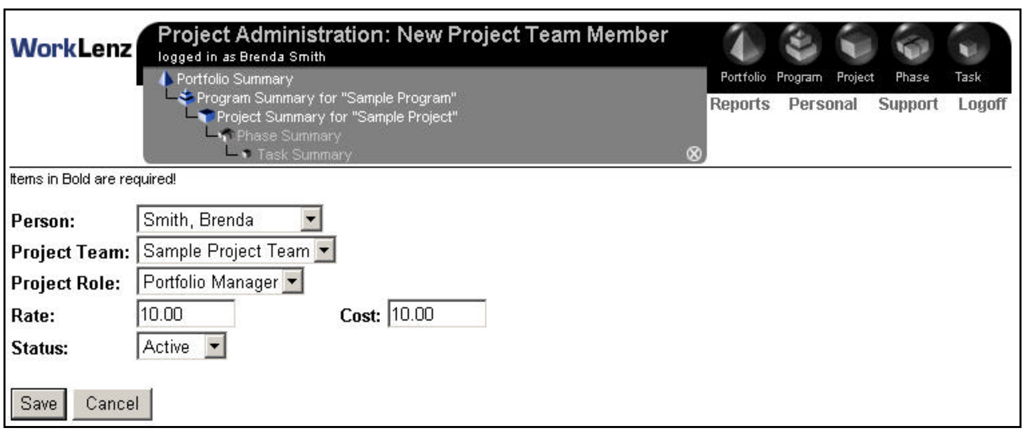
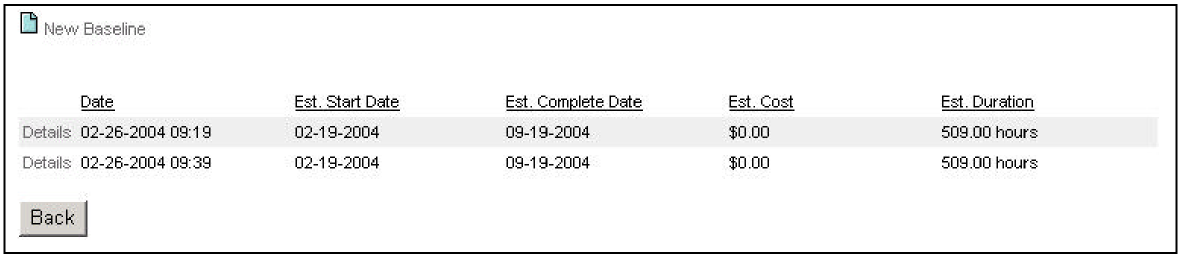


Figure 21: New Project Team Member

?? Baselines: When a project has reached a maturity level and is ready to be baselined, this utility provides the ability to capture a project baseline. To add a new baseline, click on the New Baseline link in the top left of the Baseline list page in project administration. The information about each baseline can be viewed by clicking on the Details link to the right of the baseline.


New Baseline

	Date	Est. Start Date	Est. Complete Date	Est. Cost	Est. Duration
Details	02-26-2004 09:19	02-19-2004	09-19-2004	$0.00	509.00 hours
Details	02-26-2004 09:39	02-19-2004	09-19-2004	$0.00	509.00 hours

Back

Figure 22: Baseline List

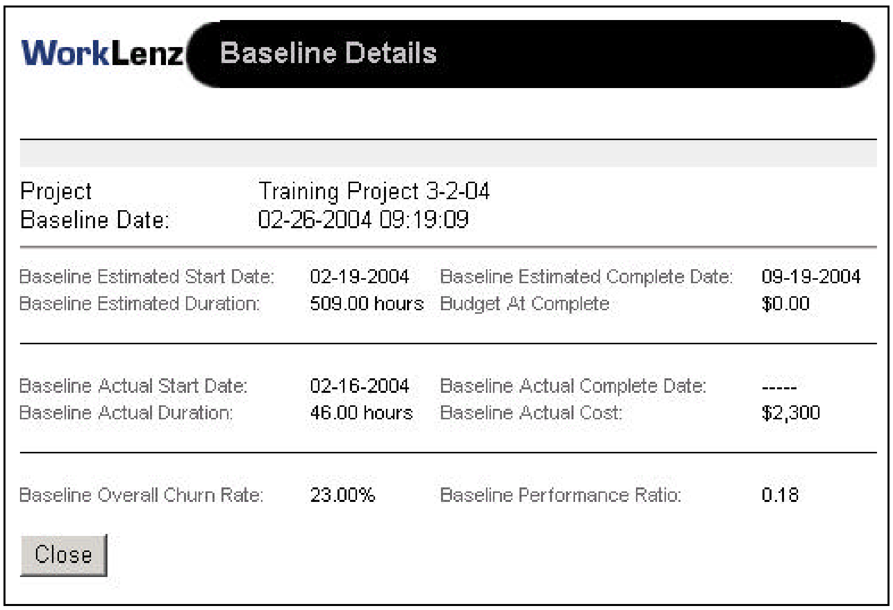


Figure 23: Baseline Details

?? Strategic Initiatives and Benefits: If strategic initiatives and benefits have been defined at the portfolio level, they can be associated with a specific project. Project managers should select the strategic initiatives and benefits that apply to their project. Click on the *Strategic Initiatives* or *Benefits* link.

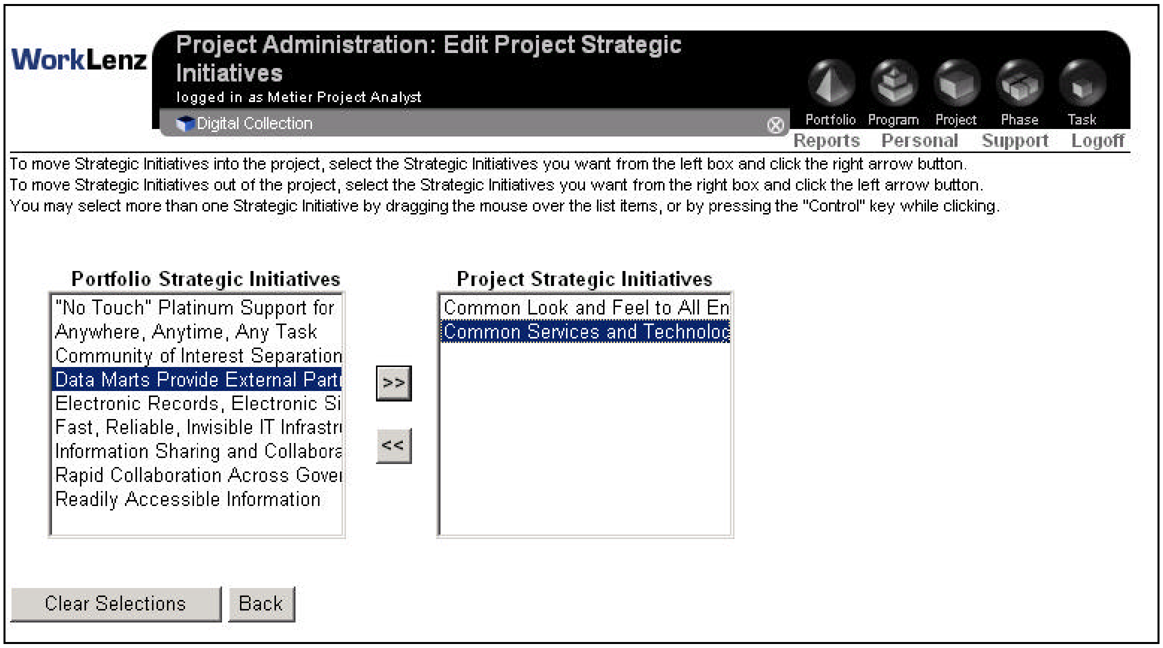


Figure 24: Strategic Initiatives

The multi-select box on the left contains the entire set of portfolio strategic initiatives or benefits. The multi-select box on the right contains those that are associated with the specific project. Select initiatives on the left or right and click the arrows in the center to create or remove the association with this project. Click *Back* when the associations are defined.

III. Using WorkLenz

Creating and Editing Projects

Creating Projects

Projects can be created and edited depending on the user's access level. Below are different ways to create new projects in WorkLenz.

1. **New Project Button**: From the program summary screen, click on *New Project*.

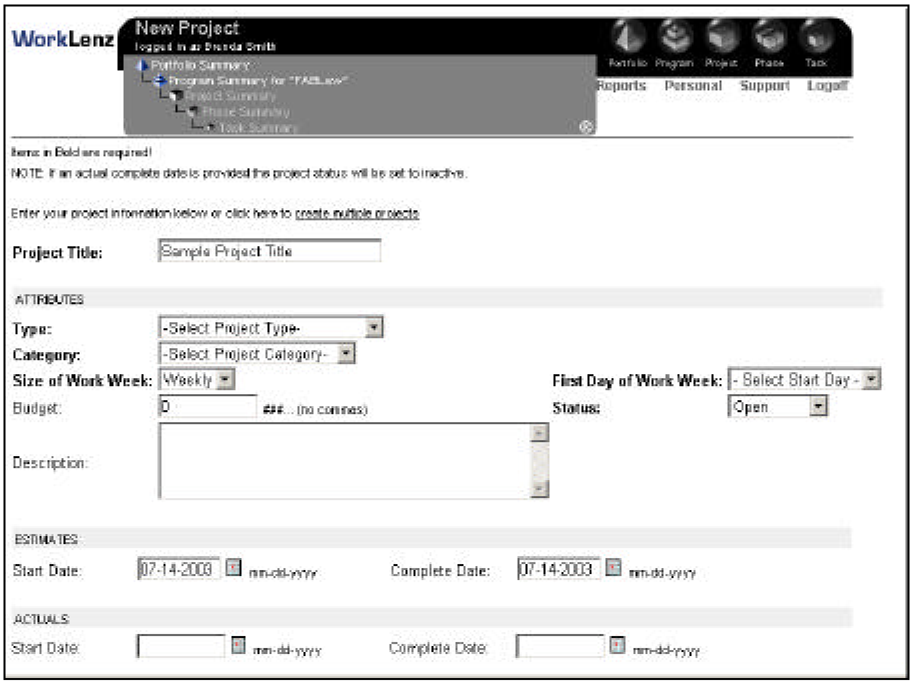


Figure 25: New Project

2. **Creating Multiple Projects**: The *Create Multiple Projects* link is ideal for situations in which many projects need to be created quickly. Up to ten projects can be created at once from the spreadsheet view.

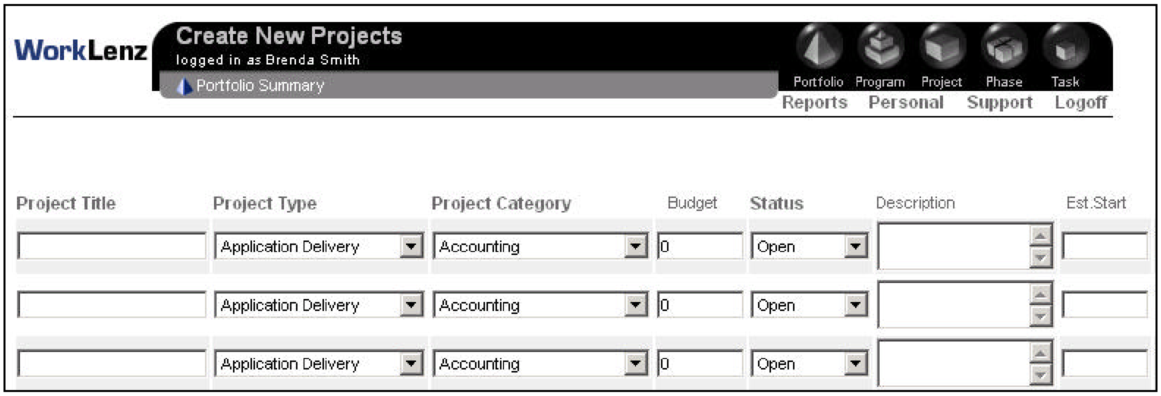


Figure 26: Create Multiple Projects

3. **Copy Project**: The copy project feature in the maintenance area of the portfolio administration screen allows users to copy existing projects from WorkLenz. The source project is copied exactly as it exists within WorkLenz with all of the same attributes.

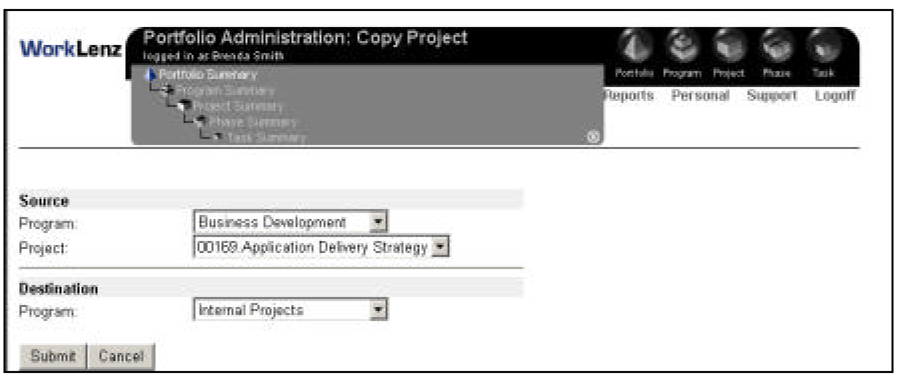


Figure 27: Copy Project

4. **Project Builder**: Project Builder is the most efficient, intelligent way to copy an existing project in WorkLenz. Project Builder incorporates past performance history and applies that information to task estimates in the new project plan. Project Builder can use templates and project metrics to build improved plans based on statistical data. To use Project Builder, go to the program administration area where the new project is to be created. Click on *Project Builder.* This will launch a wizard that will walk the user through the project creation process.

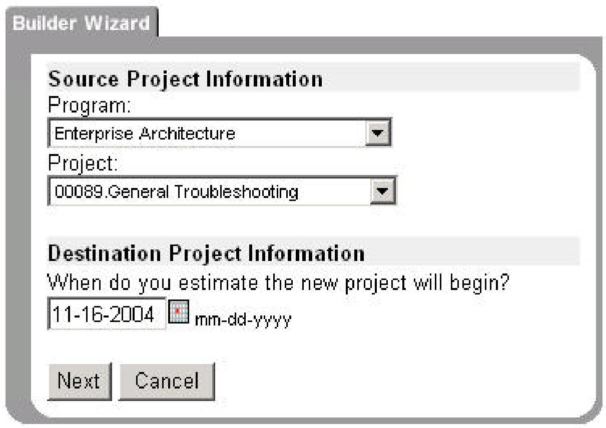


Figure 28: Project Builder

Select the existing project or template that should be copied. Select the date that the new project will begin. Project Builder will then prompt the user to select the properties that the new project should inherit. It also asks whether the new project should be staffed with a generic placeholder or with the same employees as the source project.

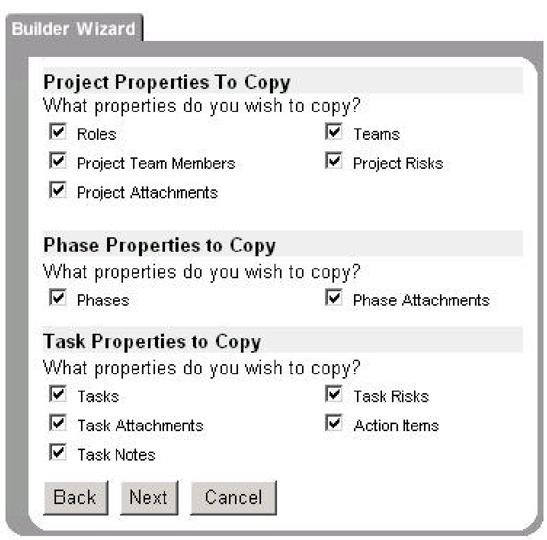


Figure 29: Properties

The final screen of the wizard is a validation of the project is about to be created. Click *yes* to create the project. Depending on the size of the project plan being copied, the creation process could take several minutes.

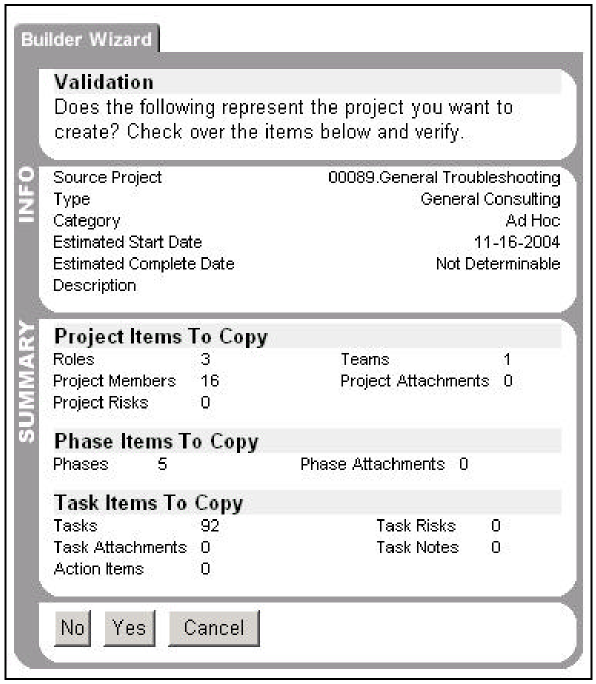


Figure 30: Project Builder Summary

Project Builder will conclude by providing a text link to the new project.

Editing Projects

Attributes of a project can be edited at any time by clicking *Edit* from the action bar on the project summary screen, depending upon the user's access level.

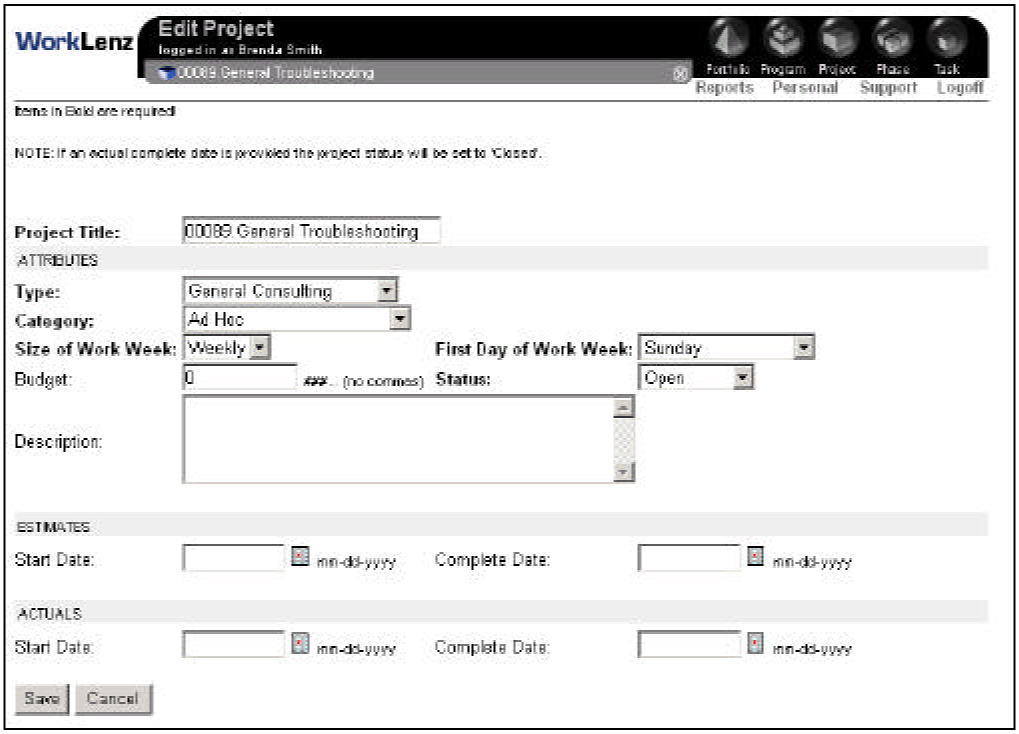


Figure 31: Edit Project

To update multiple projects at the same time, use the *Mass Edit* capability from the project list page. See the List Pages section of the training guide for more information.

Creating and Editing Phases

The breakdown of a project into phases is generally dependent on the organization's particular work situation and type of work being performed. Phases could include design, development, implementation, etc. Métier can assist in standardizing unstructured processes around distinct, defined phases or fixed periods of time.

Creating Phases

To create a single phase, click the *New Phase* link in the action bar on the project summary screen. To create more than one phase, follow the steps to create a single page, then select *Create Multiple Phases* from the *New Phase* screen. This will allow the creation of up to ten phases at one time.

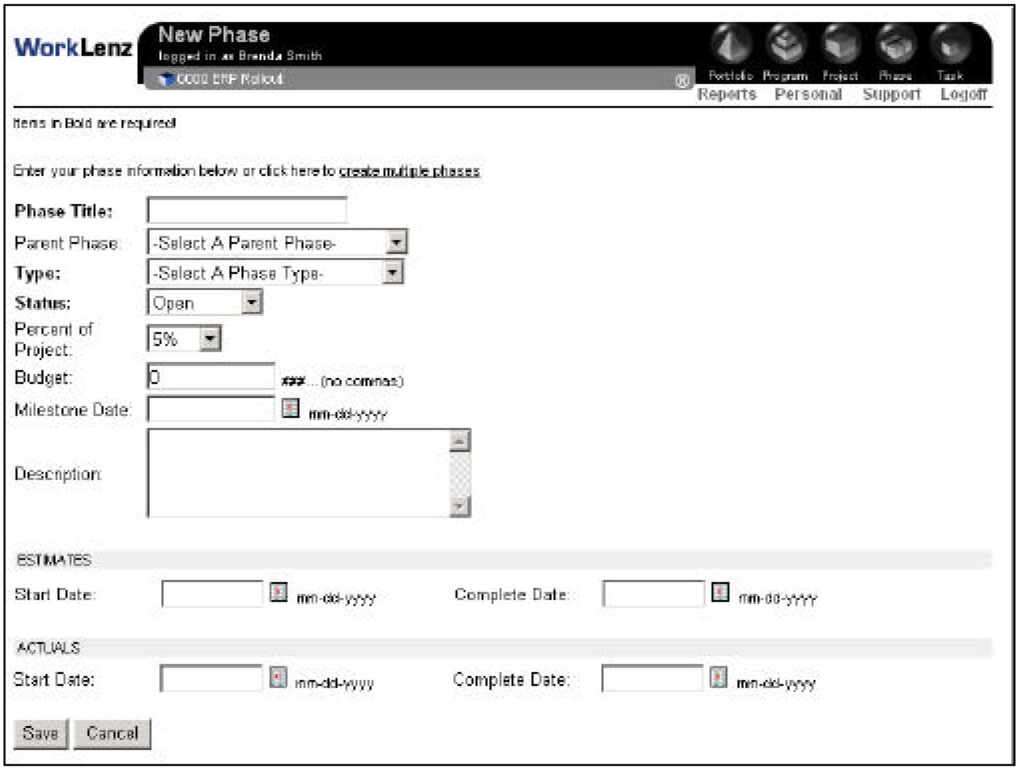


Figure 32: New Phase

Editing Phases

Attributes of a phase can be edited at any time by clicking *Edit* from the action bar on the phase summary screen. Multiple phases can also be edited at the same time through the phase list page. See the section of the training guide on List Pages for more information on using *Mass Edit*.

Creating Nested Phases

WorkLenz allows users to create nested phases, or phases with a parent-child (dependent) relationship.

To create a nested phase within an existing phase, click on the *New* link and choose *Phase* in the action bar of the phase summary screen.

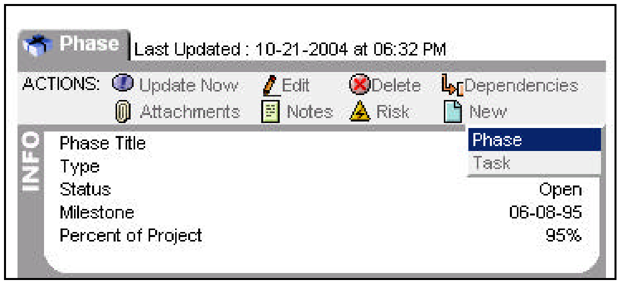


Figure 33: Create Nested Phase

The *New Phase* link brings the user to the New Phase screen where a single phase can be created or multiple phases can be created using the *Create Multiple Phases* link. Nested phases are created and edited with the same attributes as other non-nested phases.

Creating and Editing Tasks

The task summary screen contains some of the most fundamental, specific, and useful information collected by WorkLenz. This data is the building block that WorkLenz uses for analysis, reporting, and prediction. The user can enter and edit task data and maintain a running tally of notes, action items and expenses on this screen.

<u>Creating Tasks</u>

Tasks can be created in many different ways in WorkLenz.

1. **New Task Button**: In the action bar of the phase summary screen, click *New* and select *Task.* The *New Task* button on the phase summary screen will create a single task in WorkLenz. All of the bold fields appearing on the new task screen are required. The project phase defaults to the phase that the user is in currently. However, the user can add the new task to another phase in the project by selecting a different project phase from the dropdown menu. Once the task attributes have been selected and added, click *Save* to submit the task and proceed to the task summary screen.

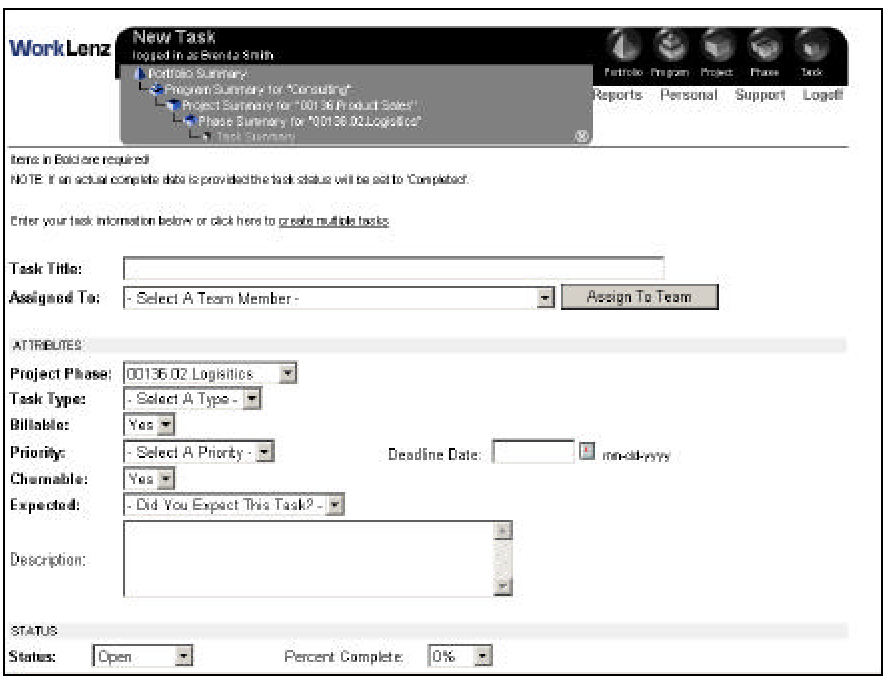


Figure 34: New Task

2. **Creating Multiple Tasks**: From the *New Task* button on the phase summary screen, users can choose to add up to ten tasks at once by clicking on the *Create Multiple Tasks* link. The spreadsheet view for ten new tasks with all of the task attributes will appear. As is the case with a single task creation, users can designate any of these new tasks to any phase within the project by selecting the phase in the project phase dropdown. Once all of the task information has been filled out, click on *Create Tasks* to submit them.

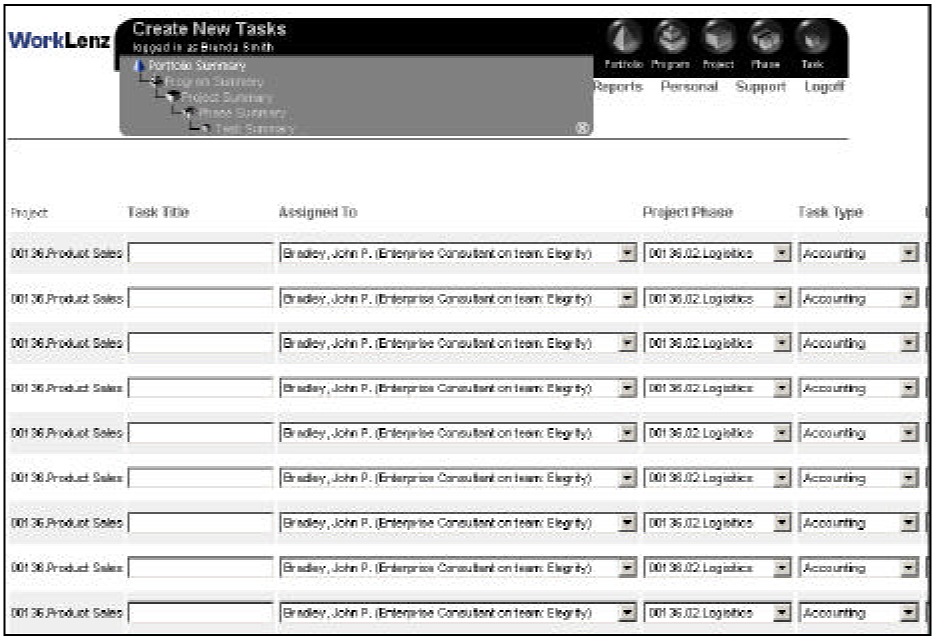


Figure 35: Create Multiple Tasks

3. **Timesheet**: New tasks can also be created from the timesheet. To the left of each project title lies the *New Task* icon. Clicking on this icon will launch the new task page within the main page of WorkLenz (usually visible behind the timesheet window). Again, users have the option to create a single task or multiple tasks within the project. Once the tasks have been created, refresh the view (F5 in Internet Explorer) in the timesheet to view and status time against new tasks.

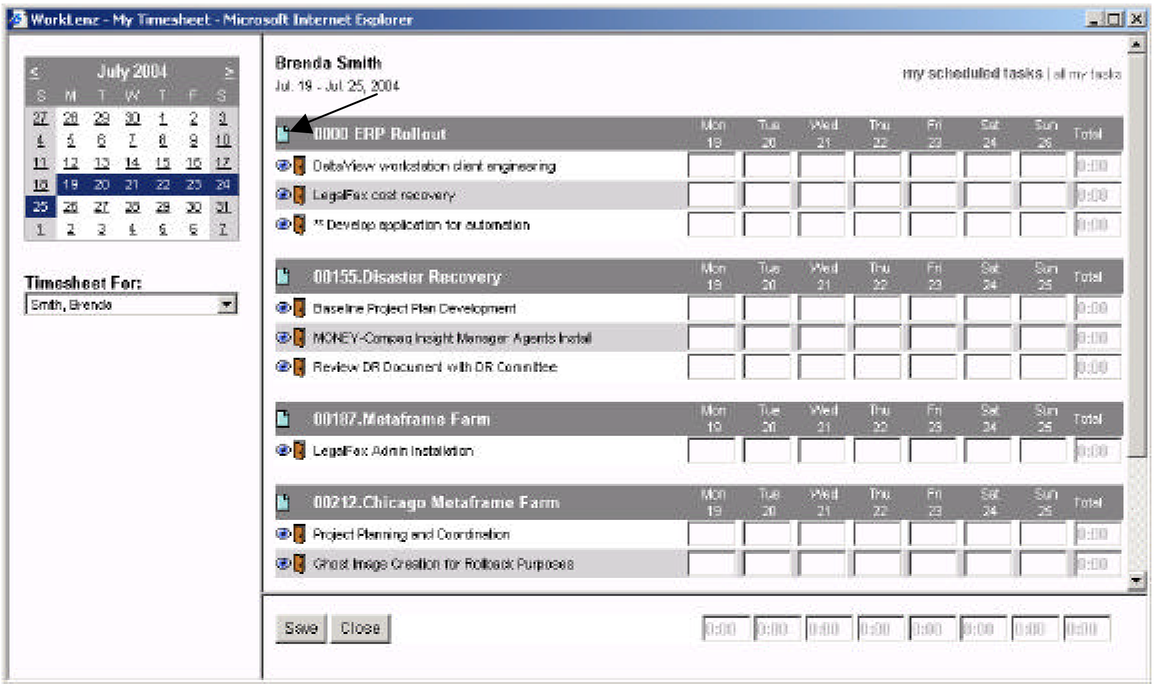


Figure 36: Timesheet

Task Summary Screen

The task summary screen is organized according to a file tab system consisting of eight tabs with unique action buttons for each:

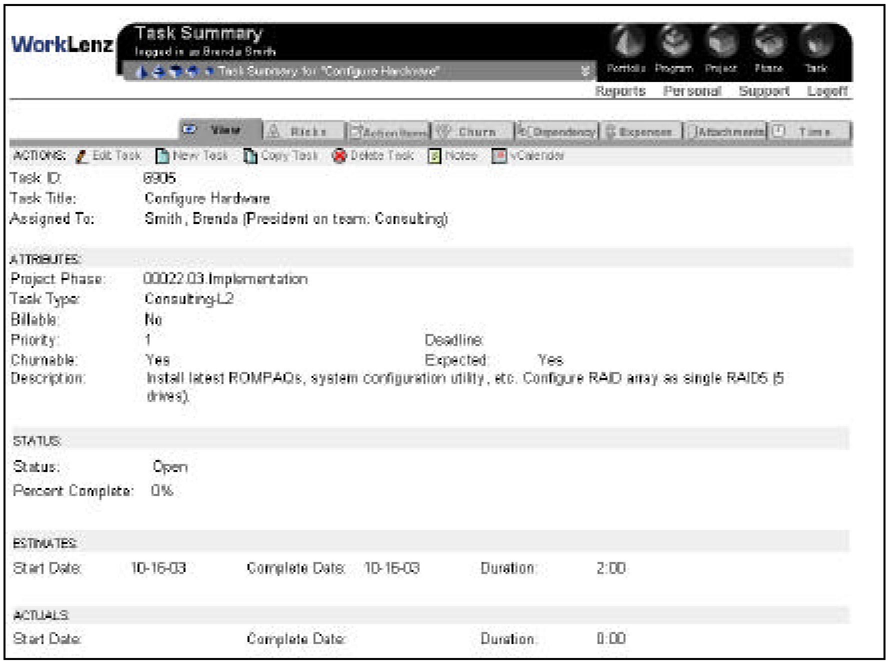


Figure 37: Task Summary Screen

View: The view tab displays task information, which can be modified by clicking *Edit Task*. *Copy Task* creates a new task that is pre-populated with the same information as the task copied. Tasks without actual time entries can also be deleted from the project by clicking *Delete Task*.

Risk: The risk tab is used to define a task's relationship to and impact on various risks. Use the *Task Risk Influence* link to assign the current task to an active project risk and indicate the task's impact on that risk. The description field provides an area to clarify any details about the relationship between the task and the project risk.

Action Items: The action item tab provides a structure for maintaining to-do lists and sub-tasks leading up to the completion of a task.

An action item priority is a subjective value relating to the importance of the action, and the order refers to the chronological sequence in which the action items for a particular task should be completed.

Churn: The churn tab displays a history of churn instances that have occurred since the creation of a task.

Dependency: The dependency tab shows the impact that the start and finish dates of one task have on the start and finish of another.

Creating a dependency:

- ? From the new task dependency screen, choose *New Task Dependency* and select the task upon which the current one is dependent.
- ? Choose *New Dependent Task* to make another task dependent on the current one.

Several dependency scenarios are possible, including, start-finish, start-start, finish-finish and finish-start. These are described and defined on the new task dependency and new dependent task screens.

Expenses: Expenses incurred by the organization for the completion of a task can be tracked on the expenses tab. WorkLenz allows users to not only track actual expenses, but also plan for estimated expenses. Task expenses also allow employees to track reimbursable expenses. WorkLenz employee expense reimbursement reports can be generated at multiple levels in WorkLenz in *Reports*.

To create a new task expense:

- ?? Select *New Task Expense* on the Task Expense Summary screen
- ?? Provide the title, type, and category for the expense
- ?? Complete any optional attributes for the expense
- ?? For estimated expenses, complete the Estimated Expense Date and Estimated Amount expected to be incurred by the organization
- ?? For actual expenses, complete the Actual Expense Date and Actual Amount paid by the organization
- ?? Select if the expense is reimbursable to the employee. If *Yes*, complete the Reimbursable Amount
- ?? Select *Save* to save the task expense entry

To modify an existing task expense entry:

- ?? Select *Edit* from the Action list on the Task Expense Summary screen
- ?? Enter or modify fields in the task expense form
- ?? Select *Save* to save the task expense entry

To delete an existing task expense entry:

- ?? Select *Delete* from the Action list on the Task Expense Summary screen
- ?? Select *Delete to c*onfirm the task expense to be removed

Attachments: WorkLenz supports attachments at the project, phase and task levels. Files can be attached to tasks and checked out by users who wish to review and/or modify them from the attachments tab. Users have the option of downloading, editing or checking out an attachment that has been saved, provided it is not currently checked out by another user.

To attach a new file:

- ?? Select *New Attachment*
- ?? Provide the title, category and description
- ?? Select the *Browse…* button to identify the path to the file

- ?? Click *Download* and follow the onscreen prompts to view or save the document
- ?? Select *Edit* to change the name or description of the document

To modify an attachment:

- ?? Select *Check Out* to reserve the document for editing
- ?? Save the file
- ?? Make any changes to the saved version of the document
- ?? Check the document back in so that others can view it
- ?? Use the check in notes field to document any changes

When a document is checked out, it is both read and write reserved by the user who checked it out. Others cannot access the document until it is checked back in.

Time: This final tab allows users to track the amount of time spent on a task. Click *New Time Entry* to enter the number of hours spent on the task each day.

At the summary level, the time feature displays the total number of hours spent on the task and allows for each time entry to be edited.

Statusing Schedule Data

Once schedule data is developed or imported into the system, project managers and team members will want to regularly status this information. Providing updated status to the schedule data will keep WorkLenz updated with the latest planning information, and provide actual performance information, including churn.

There are several ways to status data within WorkLenz. Two of the more common methods are entering actual hours via the timesheet, and statusing the percent complete and actual dates via the Edit Task screen.

Using the Timesheet

To access the timesheet, click *my timesheet* from the splash screen or *My Timesheet* from the *Personal* link in the utility menu.

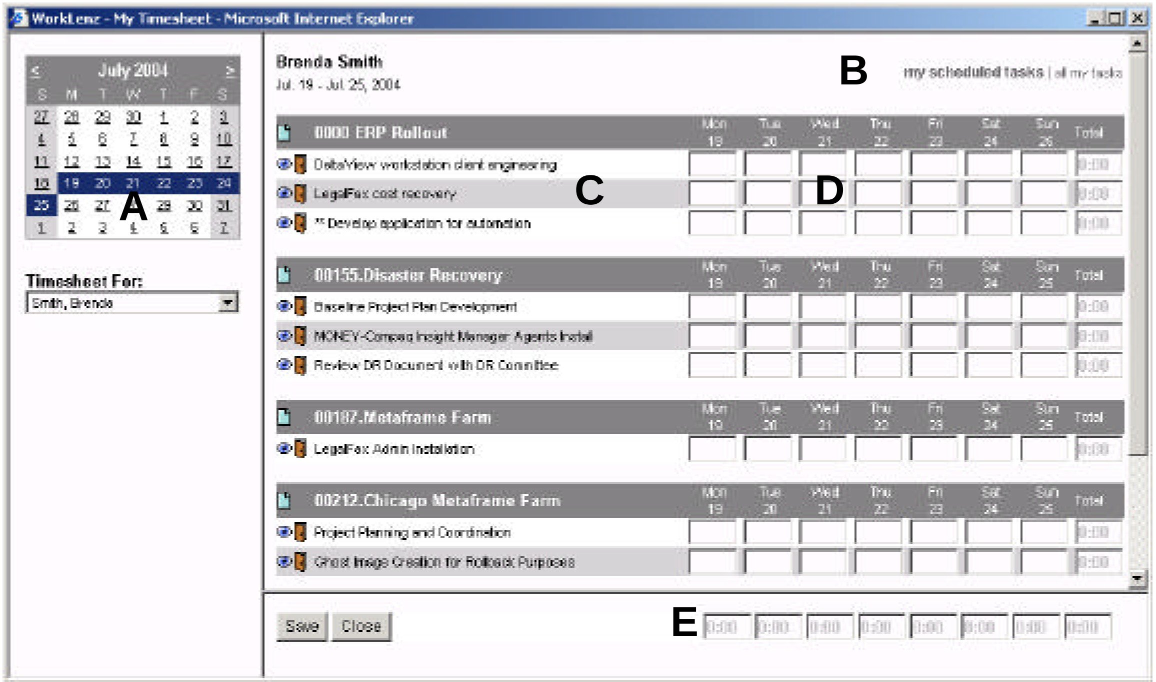


Figure 38: Timesheet

(A) Calendar: Use the calendar menu to select a weekly time range in the past, present or future.

(B) Task View Toggle: Use task view toggle to select between tasks with estimated dates within the selected week and all assigned tasks.

(C) Task Lists: Tasks that have not been completed are grouped by project and listed under each project name (dark bar).

(D) Time Entry: Use the time entry boxes to status work measurements. Times can be entered in *hour:minute* or fractional formats.

(E) Time Totals: After task actuals have been entered, the time total column and row offer a measurement of the total time per task and total time per day.

Other timesheet features

- View the task details in WorkLenz by clicking the *eye* icon beside a task on the timesheet.
- After entering hours for the tasks and days indicated, click the *Save* button to save time entries.
- Click the *door* icon to close a task, if applicable. Users must enter time against a task in the current week in order to close it from the timesheet.
- Create a new task by clicking the *new* icon beside a project in the timesheet. This will link the user to a new task entry screen for the selected project in the main WorkLenz page.
- If new tasks have been added since the timesheet was opened, hit F5 (in Internet Explorer) to refresh the timesheet with the new tasks.

?? Double clicking on a cell in the timesheet opens up a detailed view of a time entry, where users can enter in a Description, Rate and Cost information, as well as any custom fields that may be set.

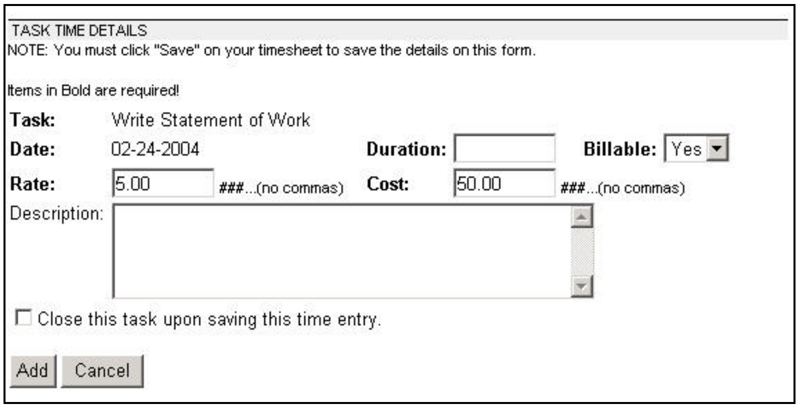


Figure 39: Time Details

Users may change their timesheet settings by clicking on the *My Preferences* link from the utility menu. Users can select whether timesheet auto calculation is enabled. When enabled, the timesheet will update the *total* column after every time entry. If auto calculation is disabled, the *total* column can be updated by clicking the *Calculate* button on the timesheet.

Risk Management

In WorkLenz, risk management is tightly integrated with the schedule data. There are two parts to configuring a new risk in WorkLenz. First, the risk must be defined. Secondly, the risk can be associated with schedule items through *risk influences* that indicate how the schedule impacts the risk. It is this association with schedule items that helps WorkLenz model risks, their mitigation plans, and analyze which parts of the schedule have the highest risk levels.

Creating and Editing Risks

Risks can be defined at the portfolio, program, or project levels depending on the scope of the risk. When creating a risk, first determine the scope of the risk. If the risk impacts the organization overall, it should be created at the portfolio level. If it is a more specific risk, it should be created at the appropriate program or project level. Additional information about risk management for the organization may be provided during the implementation process.

To create a risk, navigate to the appropriate level (portfolio, program or project). Select the *Risk* link from the action bar. This brings the user to the Risk List page. Select the *New Risk* link to create a new risk.

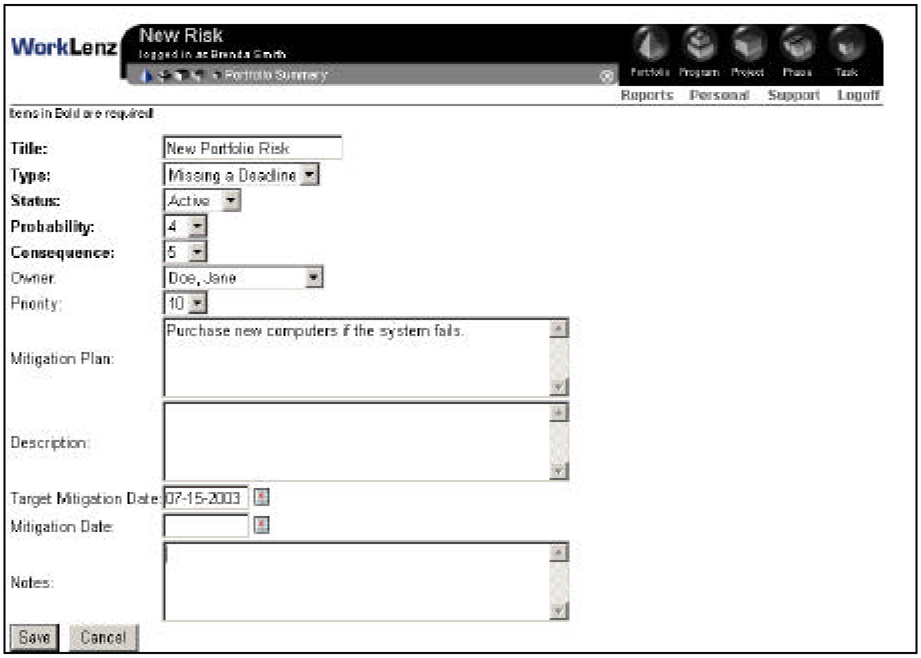


Figure 40: New Risk

Populate the form fields with details about the new risk:

- The **probability** and **consequence** of a risk is assessed on a scale of 1-10, with 10 being the highest. The mathematical product of the probability (likelihood of occurrence) and the consequence (effect if the risk is realized) yields a risk value ranging from 1-100. Default values can be assigned to the probability and consequence fields based on the type of risk being added. For example, all technical risks could have a default consequence of 10 since the impact of a technical failure would be severe.
- Risks are ranked by **priority** and are assigned to an **owner**.
- A **mitigation plan** can be added for each risk and is tracked using a target date and an actual date.

After filling out the necessary fields, click *Save* to create or update the risk.

Creating Risk Influences

The second part of risk management in WorkLenz is the creation of *Risk Influences*. Risk influences are links between a risk and an item in the schedule. If a schedule item has a risk influence, it indicates that this schedule item has an influence or impact on the likelihood of this risk occurring.

To create or edit a risk influence, first navigate to the appropriate schedule item. Risk influences can be created throughout the WorkLenz data hierarchy. Schedule items can only be associated with risks that are *above* them in the hierarchy. For example, any schedule item can be associated with a portfolio level risk, but only tasks within a specific project can be associated with a project level risk. Click on the *Risk* link from the action bar to retrieve the Risk List page.

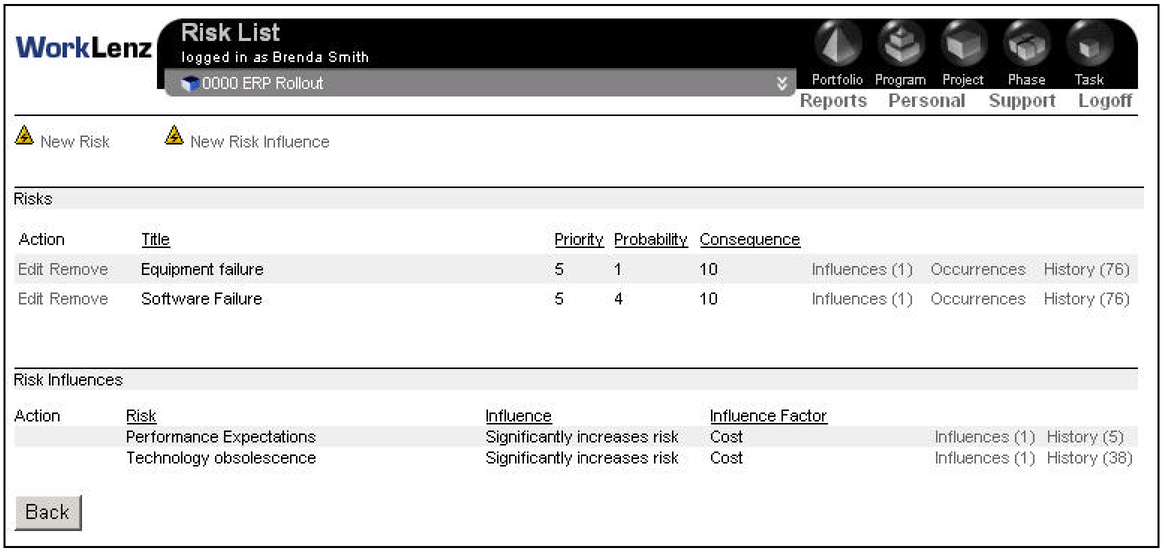


Figure 41: Risk List

From the Risk List page, users can create/edit risks or risk influences. Click on *New Risk Influence* or click *Edit* beside a risk influence to edit the influence.

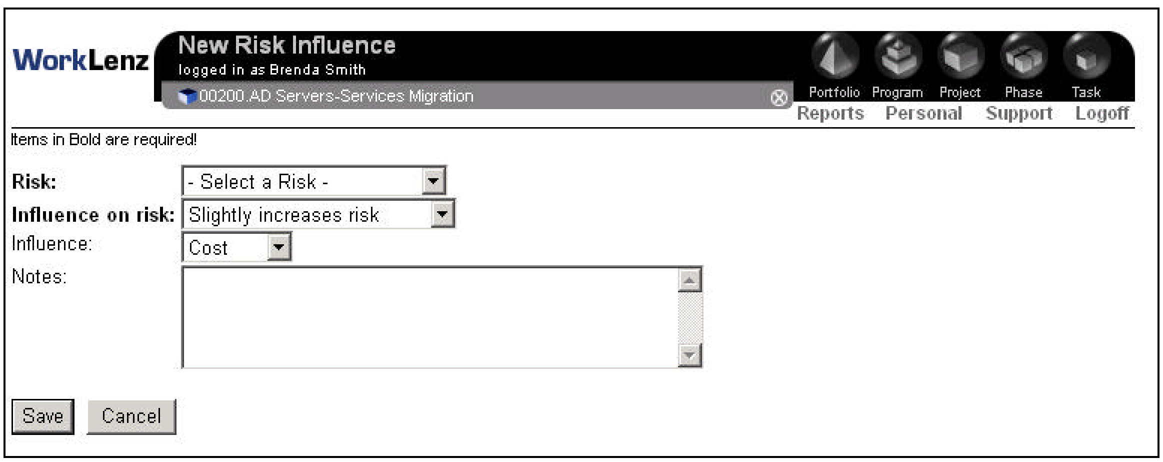


Figure 42: Risk Influence

Select the risk that this item influences. Then select whether this schedule item increases or decreases the likelihood of the risk occurring. Click *Save* to record the risk influence.

Dependencies

Dependencies indicate the impact that one schedule item has on another schedule item. Dependencies can be created between items of a similar level (for example, project to project dependency) or between levels (task to project dependency). There are *predecessor* and *successor* dependencies depending on the sequence of the schedule items. In addition, there are four types of dependency relationships depending on the dates involved: start-finish, finish-start, start-start, finish-finish.

To create a new dependency relationship, click on the *dependency* link in the action bar of a summary screen. This brings the user to the *Dependency List* page. This page contains a list of all dependencies associated with the current data item, separated into predecessors and successors. Click *Edit* or *Delete* beside any dependency in the list to modify or remove that association.

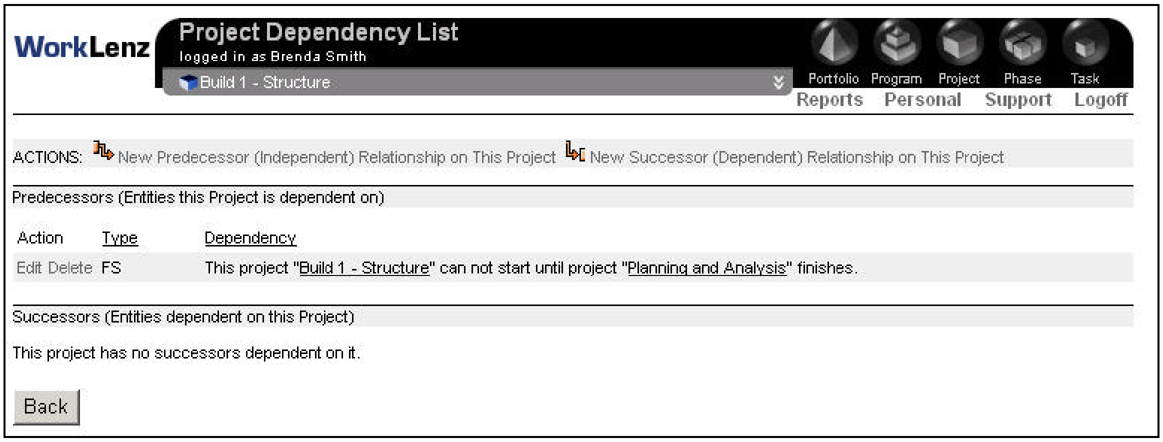


Figure 43: Dependency List

Click on the link *New Predecessor* or *New Successor* depending on the type of dependency relationship to be created.

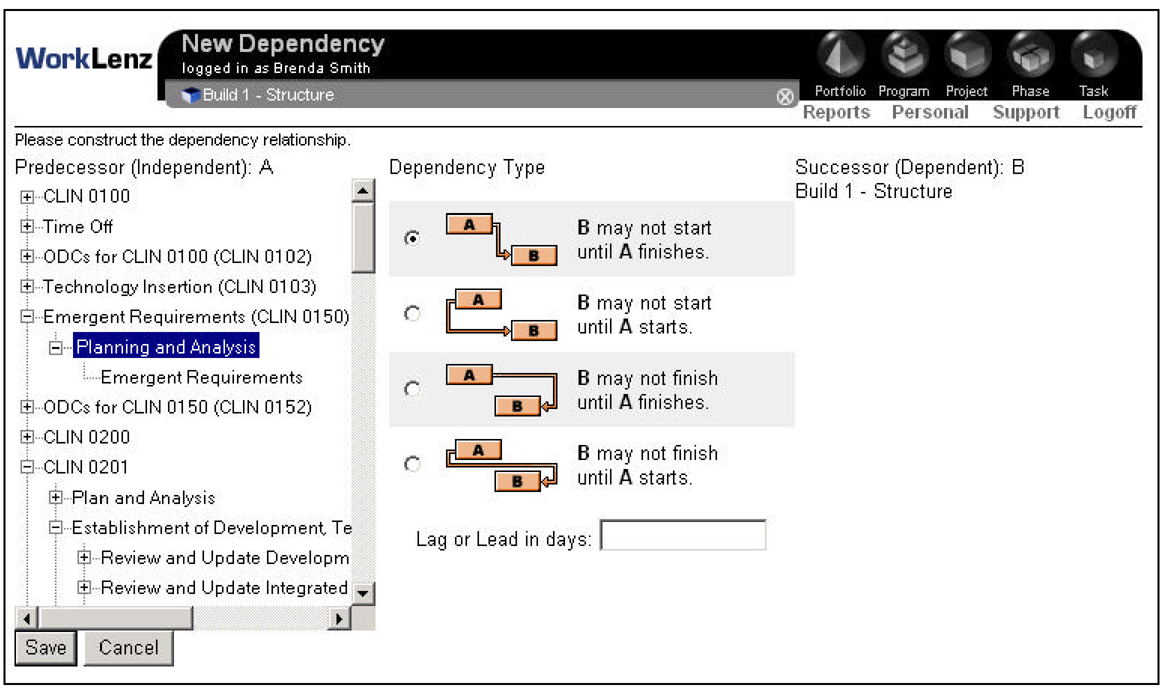


Figure 44: New Dependency

Select the other data item for the dependency from the hierarchical tree view. Select the type of dependency to create. Type in the number of days of lead or lag if appropriate. Click *Save* to store the dependency.

IV. Advanced Features

Portfolio Assessment Engine

The Portfolio Assessment Engine provides the capability to create and answer scored questionnaires, called *Assessments.* Typically, assessments are created for the project level. Some assessments apply to all projects in WorkLenz, and other assessments only apply to specific types of projects. Users with the appropriate access level will be able to answer, score and report on assessment results.

Selecting an Assessment

Navigate to the program or project for which to which the assessment is applied. From the program or project summary screen, click the *Admin* link. From the administration screen, click the *Assessments* link to access the assessment list page.

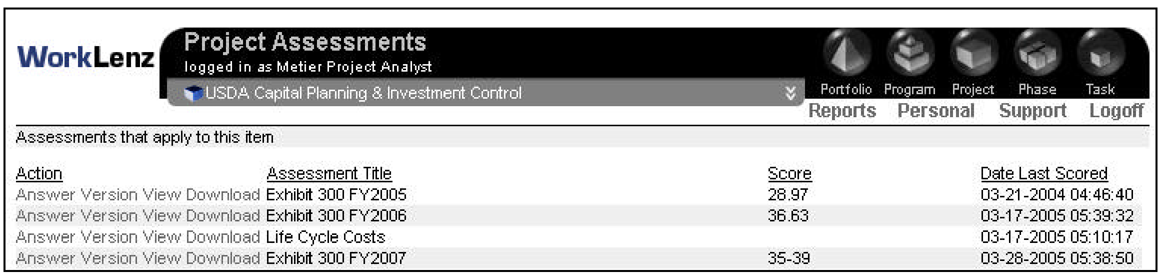


Figure 45: Assessment List

On the assessments list, users can select from the assessments available for that specific program or project. Click on the *Answer* link of the assessment to access the assessment answers screen. Click on the *Version* link to save an assessment version or view existing versions. Click on the *View* link to view the assessment details in a specific transform. Click the *Download* link to download the assessment details. The assessments list also displays assessment grades and the date an assessment was last scored.

Navigating an Assessment

The assessment answer screen has a toolbar that contains navigation and assessment-related functions, such as save, print and score. Assessments can range from one page to many pages in length. Each page will have a series of questions, followed by input areas for their respective answers. These input areas may be dropdown lists, text boxes, data tables or radio buttons. Questions can be set-up to be answered by the user or answered through data found in other areas of WorkLenz.

Across the top of the assessment answers page, there is a menu area. This area allows users to store, score, and output assessment answers.

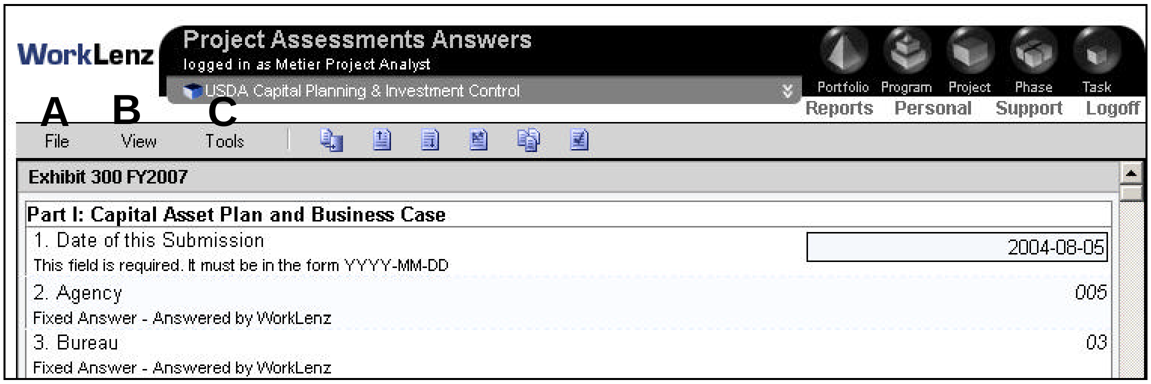


Figure 46: Assessment Answers

(A) File Menu: The file menu includes "Store Assessment Answers" and "Exit" functions.

(B) View Menu: The view menu allows users to quickly navigate to any section of an assessment and go to the top or bottom of the assessment at any time.

(C) Tools Menu: The tools menu includes Scoring ("Score Now", "View Results", "Download Results", "Versions") and Validate.

Score Now will score the entire assessment with its current answers. The assessment must be scored before the results can be viewed or the scoring report can be used.

View Results launches a popup window that lets the user choose the format for the results. Results can be rendered in standard HTML output, or for some assessments, XML or other formats.

Download Results allows users to save the last scored version of an assessment directly to their computers.

Versions provides a dialog box that allows the user to save an assessment version or access prior versions of the assessment.

Validate will run validation criteria against the answers for some assessments. This feature is particularly helpful when data must have a specific format, such as with the OMB Exhibit 300.

Answering an Assessment

On the answer screen, users are able to answer questions in the assessment. There are several answer formats used in WorkLenz assessments. Each one is designed to capture a different type of information.

Figure 47: Question types

Text Fields allow the user to type in an answer. Sometimes this answer has to be in a specific format, such as a date. This format will be specified below the question if applicable.
Rich Text Fields allow the user to enter in rich text formatting such as bullets, numbering and different font types, sizes, and colors.

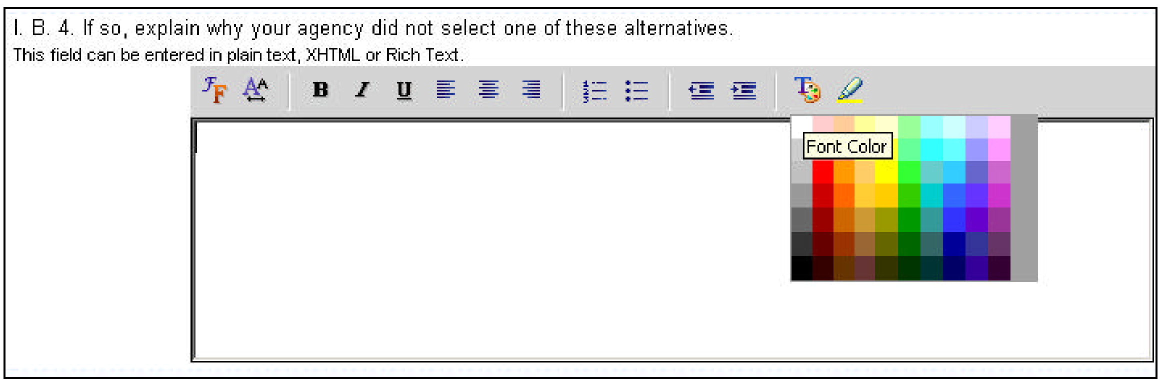


Figure 48: Rich Text Fields

Multi-Select List Boxes allow the user to select one or more choices from the box.
Drop Down Lists allow the user to select only one choice from the box.

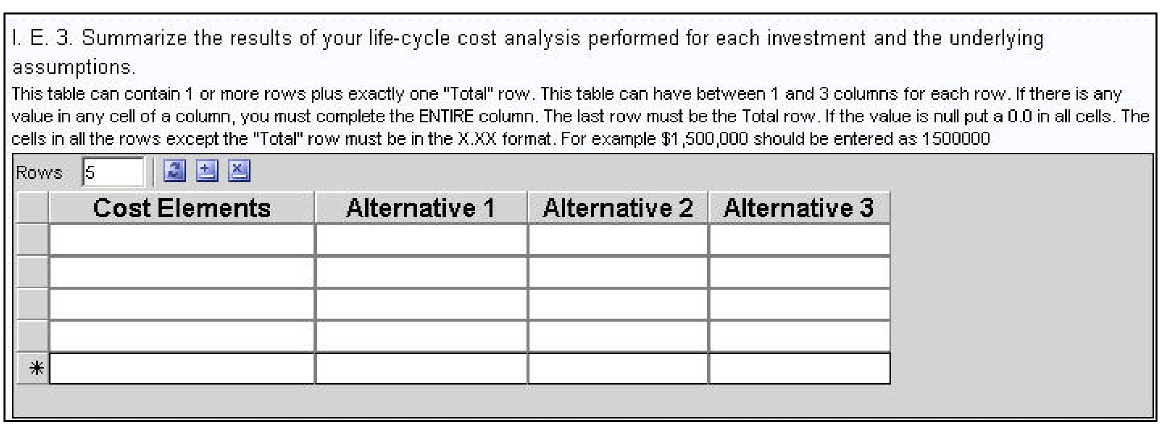


Figure 49: Data Tables

Data Tables allow the user to select the number of rows (in some cases, the number of columns as well) for the table using two methods. Either type the number of rows desired for the table and click the button to add multiple rows or click the button to add a single row to the bottom of the table. To delete rows, select the row to delete and click . Navigate between the table cells using the "Tab" button or the arrow keys. Columns can be expanded and collapsed by dragging the edge of the column either to the left or the right. Additionally, selecting the row and clicking again to go into edit mode allows a user to complete an entire row of a table.

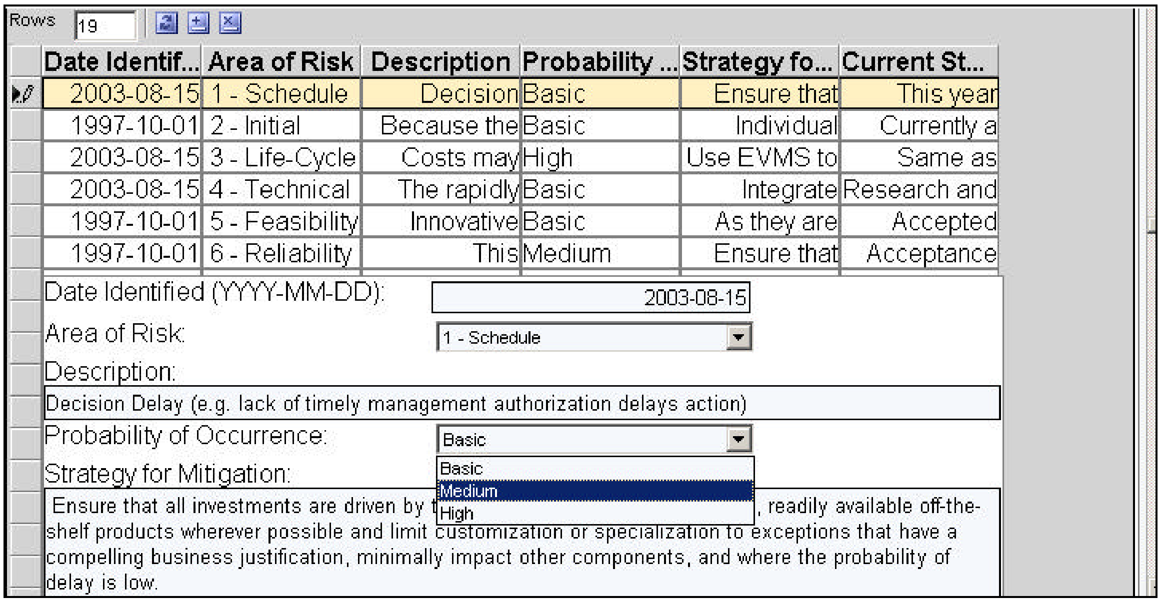


Figure 50: Data Tables

Dependent Questions are questions that are required based on the answer to a previous question. Questions that do not need to be answered will be displayed in light gray and are unable to be edited.

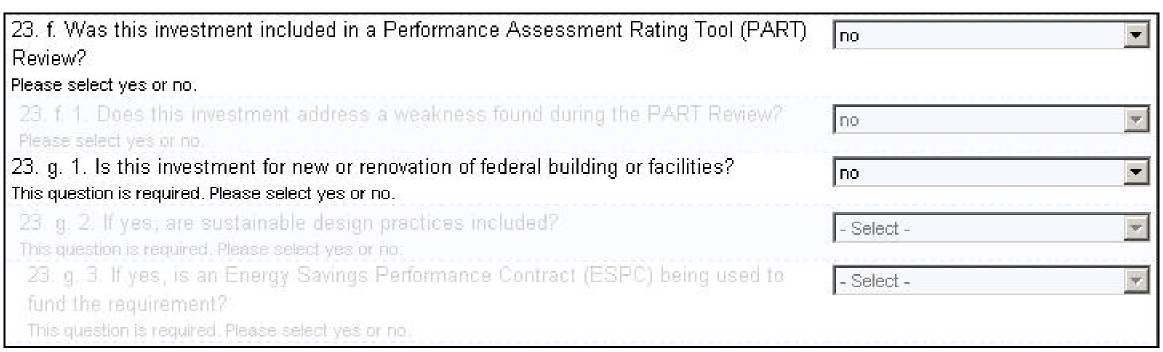


Figure 51: Dependent Questions

WorkLenz Answered Questions are questions that WorkLenz will answer based on the other data in the application. These questions will not have an input area, but instead will display the WorkLenz answer in italics.

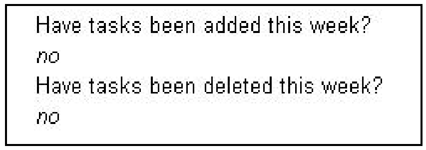


Figure 52: WorkLenz Answered Questions

Saving Answers

Users can save assessment answers either by selecting "Store Assessment Answers" from the *File* menu on the answer screen toolbar or by clicking the icon located at the top of the menu, next to *Tools*.

Validating Answers

WorkLenz allows users to run validation on assessment answers to determine if answers are correctly formatted to meet data requirements. Select *Validate* on the *Tools* menu of the answer screen toolbar to run the validation or by clicking the icon located at the top of the menu. A pop-up window will detail those questions that do not meet data format requirements.

Scoring

Using a custom objective scoring methodology, assessments can be scored by selecting *Score Now* from the *Tools, Scoring* menu on the answer screen toolbar or by clicking the icon located at the top of the menu. Assessment scoring results are also viewable in the WorkLenz Report Center, either using the *Assessment Scoring Report or* via custom scoring reports.

Viewing and Exporting Assessments

Prior to viewing results, users must score each assessment to see the most up-to-date answers. Users can view assessment answers in several different formats by selecting *View Results* from the *Tools, Scoring* menu of answer screen toolbar. The assessment will be displayed once an output type such as Standard HTML or XML has been selected. Users can then press the *Save* button to save the results of an assessment directly to the computer. Additionally, users can download HTML results to a computer by selecting *Download Results* from the *Tools, Scoring* menu or by clicking the *View* link found on the Assessment list screen

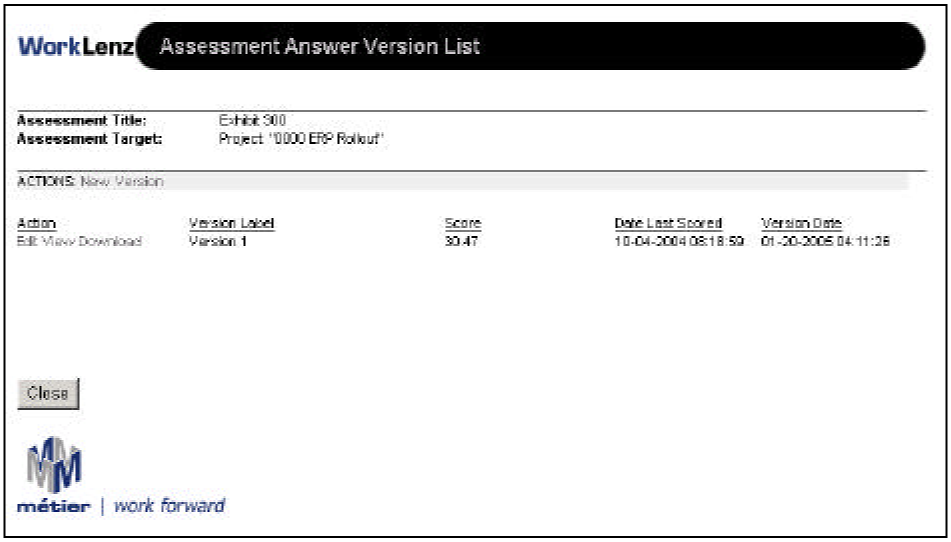


Figure 53: Versioning Assessments

Versioning Assessments

Clicking the New Version link can save versions of assessments. A version must be given a name and can be given a description. Saved versions can be edited, viewed, and downloaded to the computer by clicking on the appropriate link next to the version name.

Email Notifications

WorkLenz users can choose to subscribe to one or many of the standard email notifications available in the application. Additional email notifications may be configured during the implementation or support process. Before users can receive an email notification from WorkLenz, they must subscribe to the specific notification. During the subscription process users will select a notification, and in some cases, provide a threshold for notification.

Subscribing to Notifications

Users can subscribe to notifications through the *personal* category in the utility menu. The notification subscription wizard guides users through the process of selecting a target level (portfolio, program, project, phase, task), selecting a notification and customizing data thresholds.

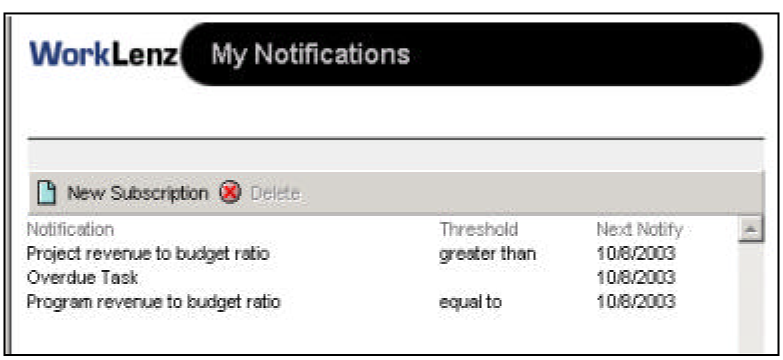
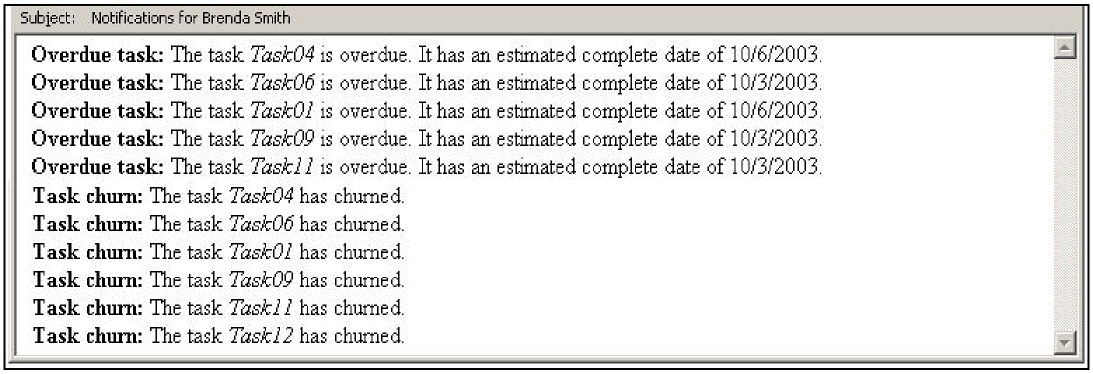


Figure 54: Email Notifications

Receiving Notifications

Notifications are customized to occur at different intervals (daily, weekly, bi-weekly, monthly). When notifications are triggered, they are compiled together and are delivered to the user's email box in a single email.



Subject: Notifications for Brenda Smith

Overdue task: The task *Task04* is overdue. It has an estimated complete date of 10/6/2003.
Overdue task: The task *Task06* is overdue. It has an estimated complete date of 10/3/2003.
Overdue task: The task *Task01* is overdue. It has an estimated complete date of 10/6/2003.
Overdue task: The task *Task09* is overdue. It has an estimated complete date of 10/3/2003.
Overdue task: The task *Task11* is overdue. It has an estimated complete date of 10/3/2003.
Task churn: The task *Task04* has churned.
Task churn: The task *Task06* has churned.
Task churn: The task *Task01* has churned.
Task churn: The task *Task09* has churned.
Task churn: The task *Task11* has churned.
Task churn: The task *Task12* has churned.

Figure 55: Example of an Email Notification

Reports

Reports are available at all levels of WorkLenz: portfolio, program, project, phase and task. Standard reports are available at each level including cost, effort and churn. Each report summarizes data based on the user's access level and the criteria chosen to evaluate. Additional customized reports may be developed for the organization during the implementation process.

To access the reports center, click on *reports* in the utility menu. A listing of available reports is displayed by expanding the plus sign for each category: churn, effort, cost and misc. Choose a report to run by clicking on the report title.

Performance Reports

?? *Assessment Scoring Report* and *Assessment Scoring Report Details* (available at portfolio, program and project levels) – This drill-down report displays both overall scoring results for assessments, as well as details of individual assessments.

?? *Earned Value Report* (available at portfolio, program, project and task levels) – This drill-down report displays the earned value analysis for the portfolio, programs, projects, phases or tasks.

?? *Program/Project/Phase Performance* (available at portfolio, program and project levels) - Graph depicts levels by performance ratio and churn with user provided bubble size and color source.

?? *Project Planning* (available at project level) - Report lists all phases and tasks for a specified project.

?? *Scorecard Report* (available at portfolio, program and project levels) - Stop light report displays variables based on finance, effort, risk and churn weights.

?? *Program/Project/Phase/Task Model* (available at portfolio level) - Table displays average metrics for the level type compared to all others across the organization.

Schedule Reports

?? *Builder Report* (available at portfolio level) - Table displays average metrics for the task type compared to all tasks across the organization.

?? *Churn Acceleration* (available at portfolio, program and project levels) - Chart depicts the average or aggregate number of days and hours that have been affected by churn.

?? *Churn Trend By Month* (available at portfolio, program and project levels) - Graphs depict 11-month historical churn data to forecast churn for following month.

?? *Slipperiness Report* (available at portfolio, program, project and phase levels) - Chart displays slippage by word, person, task type, team or role.

?? *Top Churn* (available at portfolio, program and project levels) - Chart and tables depict top churning variables.

?? *Abridged/Comprehensive Task Status* (available at portfolio, program and project levels) - Report provides overview or details, respectively, of task status for the previous, current and upcoming week.

Resource Reports

?? *Full Time Equivalent Utilization* (available at portfolio, program and project levels) - Report shows the number of full time equivalents per month.

?? *Resource Availability* (available at portfolio, program and project levels) - Chart displays availability of resources based on user-selected variables.

?? *Resource Performance* (available at portfolio, program and project levels) - Graph depicts people by performance ratio and churn with user provided bubble size and color source.

?? *Employee Hours* (available at portfolio, program, project, phase and task levels)

- o *Standard Employee Hours* - Chart displays employee actual durations based on user-selected variables.
- o *Weekly Employee Hours* - Chart displays employee work hours for a date range.

Admin Reports

?? *Active Person Report* (available at the portfolio level) - A list of all of the active users

?? *Expense Reimbursement* (available at the portfolio, program, project, phase and task levels) - Report creates a standard form for reimbursement of task expenses paid by employees.

Defining Custom Fields

WorkLenz allows users to define custom fields for the entire portfolio, or for a specific section of the data hierarchy. These custom fields can apply to the program, project, phase or task level as well as to risks, durations and people. Each custom field can have a specific format such as a textbox, radio button, drop down list, data table etc. Portfolio level custom fields will be defined during the implementation process. However, users can create additional custom fields for their own programs or projects.

Custom Field Types

To create a new custom field, navigate to the appropriate administration area. For portfolio level custom fields, go to the portfolio administration. Custom fields created at a program or project level will only apply to data within that program or project.

Click on *New Custom Field* to create a new custom field. At this screen users can enter the title of the field (which will be displayed to other WorkLenz users), the type of field, and where it will apply within the application.

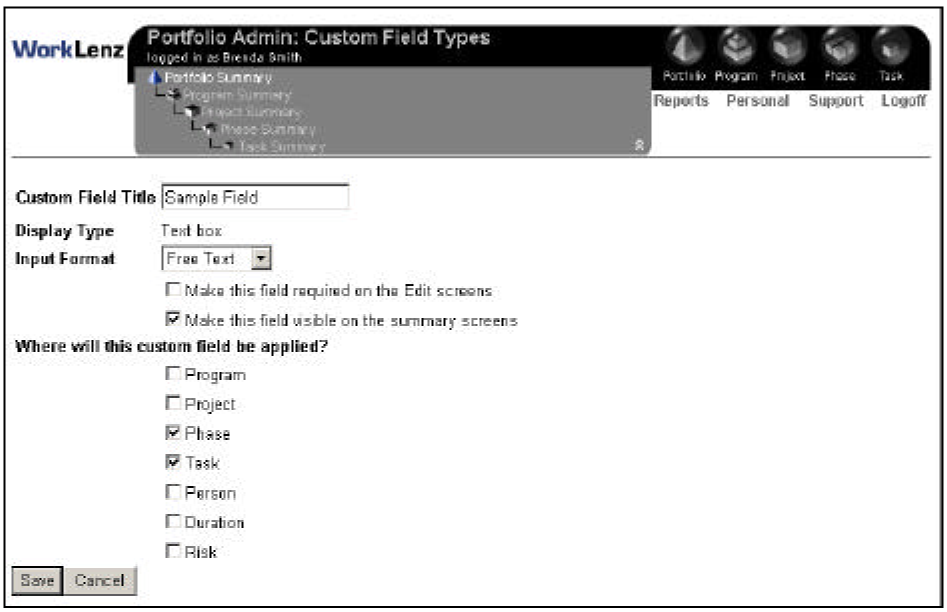


Figure 56: Custom Field Types

Click *Save* to record this custom field.
If this field is a free entry type field such as a text box or date field where the user inputs a data string, the custom field is complete. However, if the custom field has an enumerated list such as radio buttons or a dropdown list, those values must be explicitly defined.

Custom Field Selections

For custom fields that require a list of enumerated values, the selections that appear within the dropdown menus must be defined. Besides serving as descriptive tags, the custom selections also serve as data points from which additional metrics can be created within WorkLenz. From the administration area select *Custom Field Selections.*

Figure 57: Custom Field Selection

The dropdown list on the top of this page contains a list of the available custom fields. Select the custom field where custom values should be defined. If there are any existing values, these will now appear below the dropdown list. To edit an existing value, click *edit* or *remove* beside the value. To create a new value, click *new selection* and input the new value. Click *Save* to add this value to the enumerated list.

To verify that the custom field was created correctly, navigate to the appropriate data level (for example, if a custom dropdown list that applies to tasks has been created, navigate to a task summary screen). When the user chooses to *edit* the page, the custom field should appear.

Microsoft Project Import

WorkLenz allows users to import project plans directly from Microsoft Project 2002 and subsequent versions. Accessed through the administration menu, Microsoft Project files can be imported at the portfolio, program and project levels and will be created at the next lower level in WorkLenz. For example, a Microsoft Project file imported at the portfolio level will create a new program or programs in WorkLenz.

WorkLenz requires XML format to import a Microsoft Project file. Save the Microsoft Project file for import as type XML Format.

WorkLenz offers a Microsoft Project Import wizard to guide users through the process of importing a file. Length of time to complete this process will vary depending on the size and complexity of the Microsoft Project file. The following section will detail the steps followed in the wizard.

Import and Review

To import a Microsoft Project file, navigate to the appropriate administration area. Click the link for *Microsoft Project Import.* This will launch a wizard that will walk through the import process.

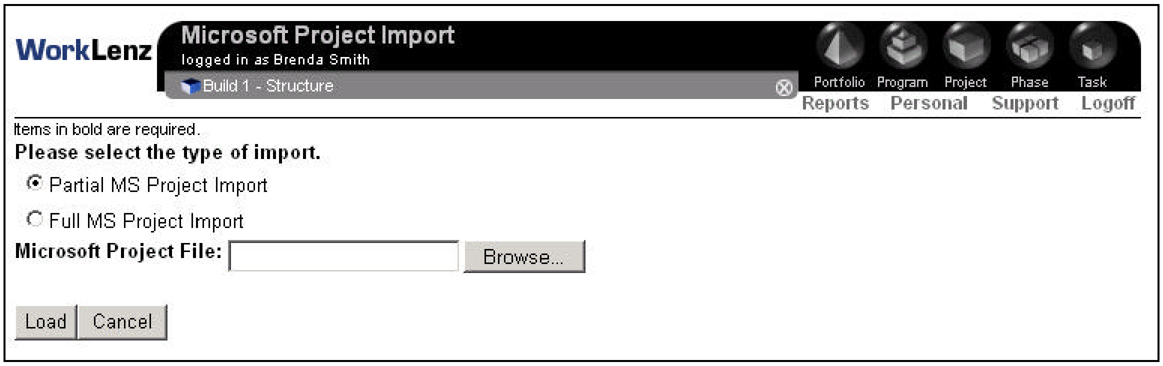


Figure 58: Select File for Import

The first screen prompts the user to load the Microsoft Project file, and to select the type of import. **Partial import** will load the file into WorkLenz, and will not delete any data already in WorkLenz. If this file has been imported into WorkLenz before, it will update the data items and create new items, but will not delete any items already in WorkLenz. **Full import** will make the WorkLenz data identical to the Microsoft Project file, including adding and deleting data. <u>Any data already in WorkLenz may be overwritten or deleted using full import.</u> Select the type of import, identify the XML-formatted Microsoft Project file and select *Load*. WorkLenz will scan the file and present a screen for user review. Click *Continue t*o accept the file as loaded.

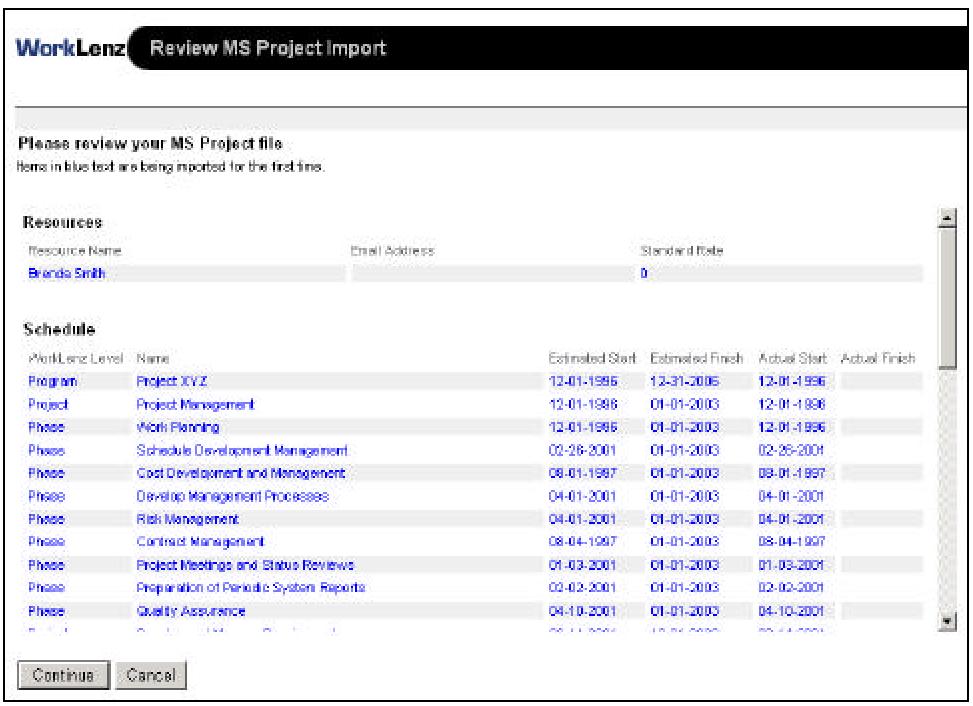


Figure 59: Microsoft Project Import Review

<u>Identify Resources</u>

If the Microsoft Project file is resource loaded, WorkLenz will verify if the resources exist in WorkLenz. For resources not in WorkLenz, complete the resource information spreadsheet with User ID, Password, Title, Person Type, Email Address, Rate and Cost. If the project file is not resource loaded, all tasks will be assigned to the generic user.

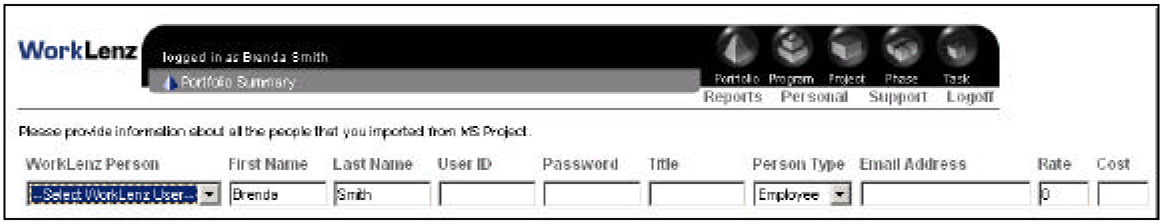


Figure 60: Identify People

Types and Categories

Continue with the wizard to complete, as necessary, program types and project types and categories.

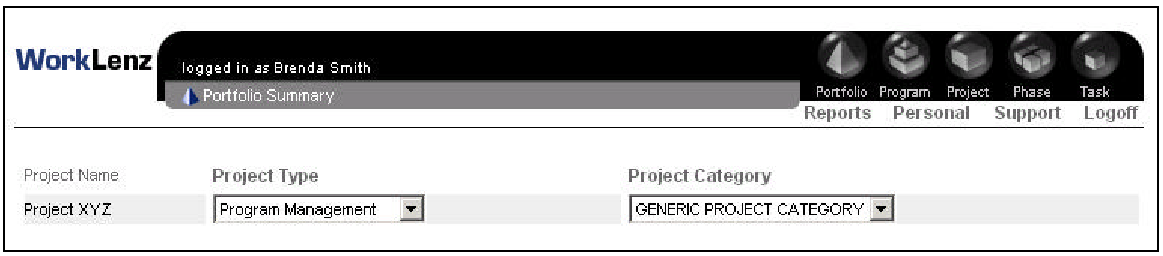


Figure 61: Select Types and Categories

Create project teams

If the Project file is not resource-loaded, WorkLenz will ask if the user to complete project team member information. To complete project team member information, click *Yes*. If project team member information is not completed, resources will be assigned to generic roles and project teams. If the project file is resource-loaded, WorkLenz will prompt the user for project team member information. To complete the project team members field, identify project roles and teams and associate resources.

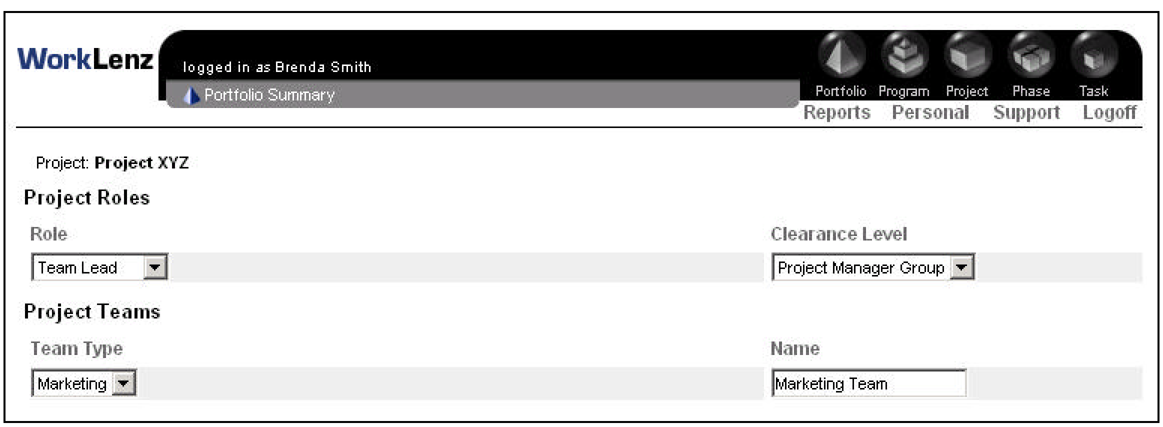


Figure 62: Create Project Teams

Select phase/task types: WorkLenz will prompt the user to select phase and task types for each phase and task in the project file.

Review Import and Finish: As the final step of the Microsoft Project import, WorkLenz summarizes all information to be loaded. Select *Finish* to complete the process.

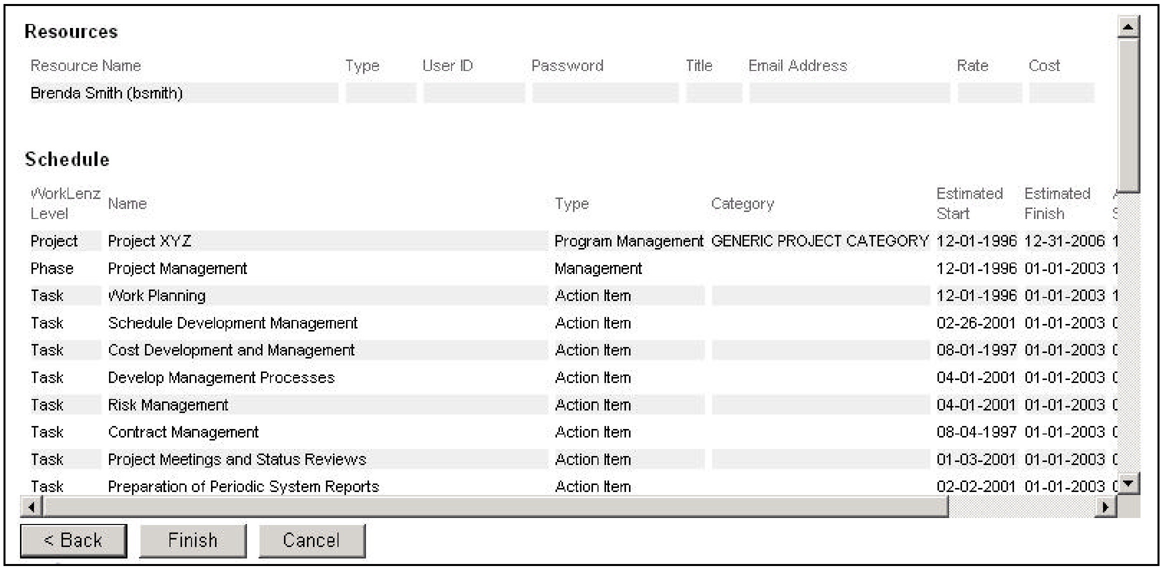


Figure 63: Review Project File

Resave the XML formatted file: WorkLenz will prompt the user to resave the XML file imported to include the WorkLenz-specific fields added during the import process.

Microsoft Project Export

WorkLenz also allows users to export WorkLenz information to XML files for use in Microsoft Project. As with the Microsoft Project Import, Microsoft Project Export is found on the administration menu at the portfolio, program and project levels in WorkLenz. To begin, click on *Microsoft Project Export*. The following section will detail the steps followed in the wizard.

Choose an existing export: To ease the export process, WorkLenz allows users to create and store export criteria. To use an existing export, select *Yes* and the export desired to complete the Microsoft Project export. To utilize other export criteria, select *No* and continue with the wizard.

Choose the level of information to export: WorkLenz allows users to select the depth of information for export. This choice (program, project, phase, task) will be the lowest level of information exported to the Microsoft Project file. For example, selecting tasks will create a project file including all WorkLenz levels down to the task, while selecting phases will only detail down to the phase level of WorkLenz.

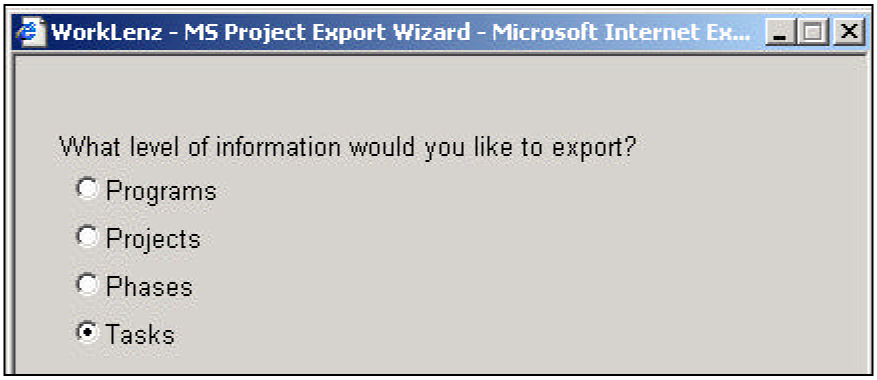


Figure 64: Microsoft Project Export Wizard

Apply filters: WorkLenz offers the option to filter data for export. These filter options are similar to the advanced filter functionality on the list pages, allowing users to filter according to criteria such as program/project/phase/task title keyword, custom fields, status, type, and category.

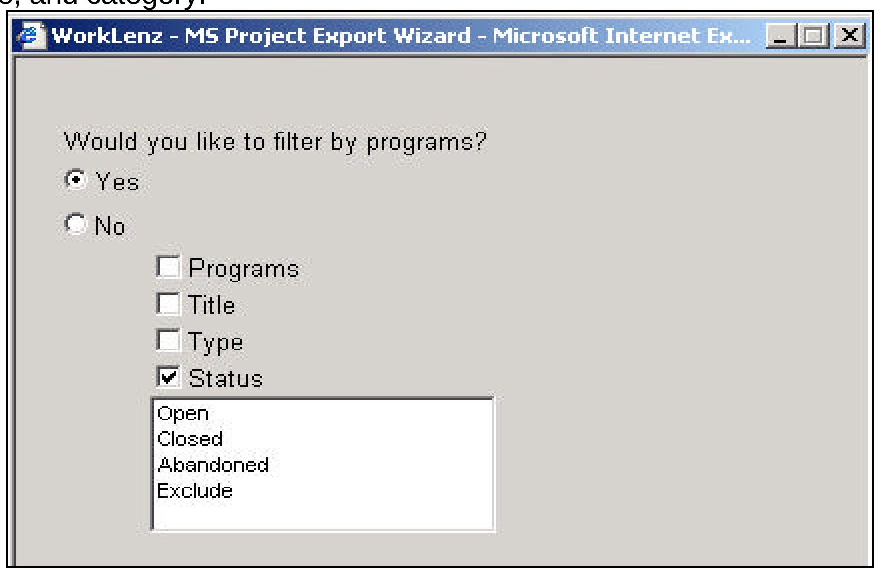


Figure 65: Filter by Programs

Choose export view: WorkLenz allows users to choose the type of view for their export. Standard View will export all selections at the levels above where the filter has been applied. Rollup View will export only the direct root of filtered data.

Figure 66: Rollup versus Standard Export

To differentiate between Standard and Rollup views, please use the following example. Brenda Smith has the following contents view of a program in WorkLenz. This program includes 2 projects, each with 2 phases and 3 tasks.

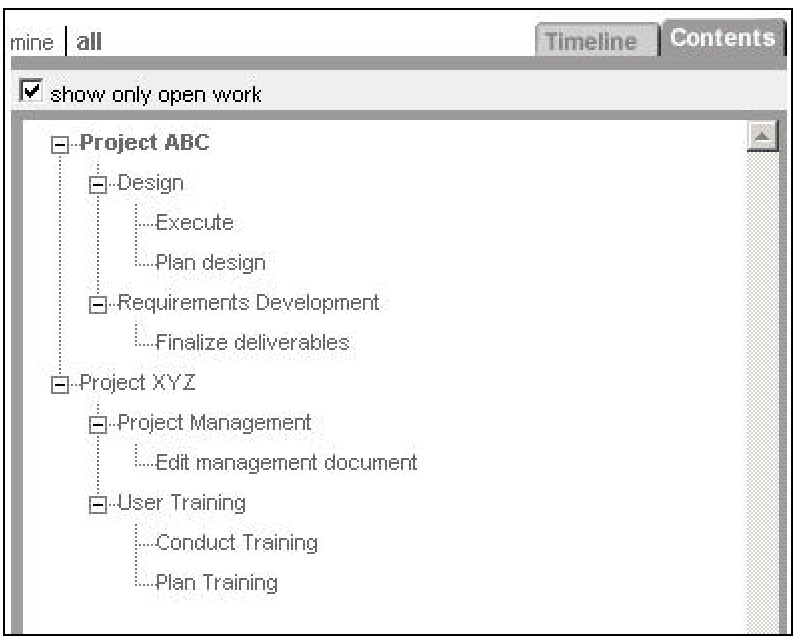


Figure 67: Data in WorkLenz

Brenda would like to export this program to Microsoft Project filtering tasks with "Plan" in the title. If Brenda selects the Standard View, WorkLenz will export all fields preceding filtered fields, including those phases that do not have tasks with "Plan" in their titles. If Brenda selects the Rollup View, WorkLenz will export only the parent fields of filtered data.

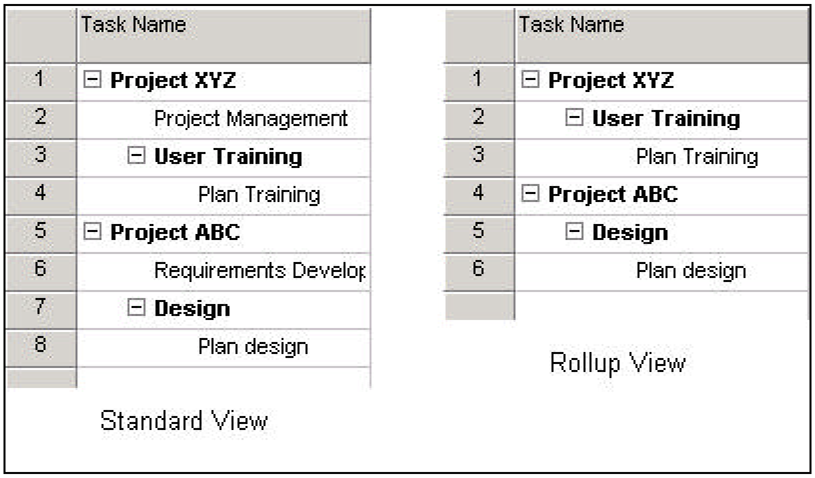


Figure 68: Comparison of Standard and Rollup Exports

Choose to export WorkLenz IDs: WorkLenz allows users the option to export WorkLenz IDs in their project file. This functionality may be desired when creating templates or utilizing the project file in other software. If users choose not to export WorkLenz IDs, they will not be able re-import the exported file.

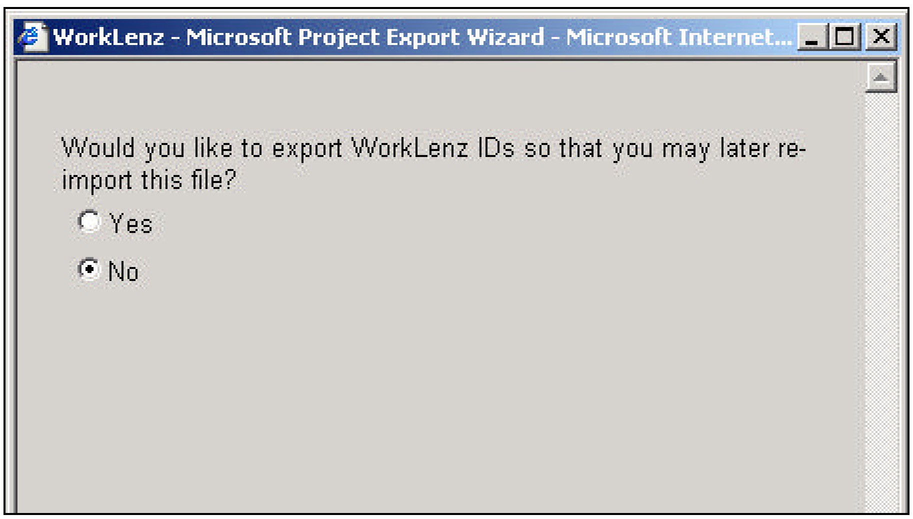


Figure 69: Export WorkLenz IDs

Save export criteria: After choosing to apply filers, WorkLenz presents the option to save export criteria. To save selected criteria, select *Yes* and complete the name and description fields.

Finish: Following a summary screen, select *Finish* to complete the Microsoft Project export. WorkLenz will then prompt users to save the export in XML format for use in Microsoft Project.

V. Conclusion

Thank you for choosing Métier as your Portfolio management solution.

Please do not hesitate to contact your WorkLenz consultants with any questions regarding the information contained in this training guide, or information you would like included in future versions.

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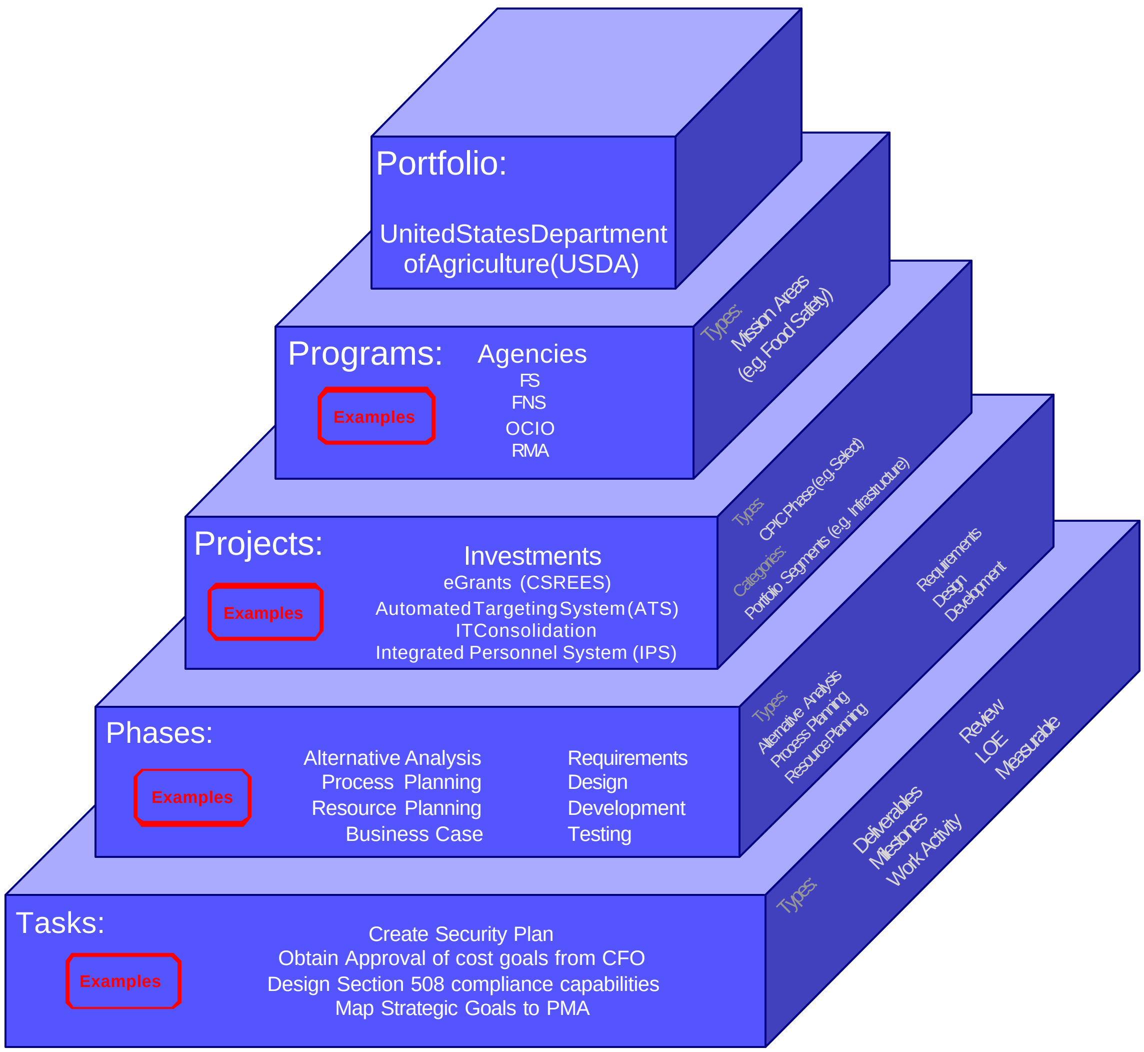
VI. Appendix

A. USDA Taxonomy Structure



3.1. Portfolio

U. S. Department of Agriculture (USDA), providing visibility into the entire Portfolio.

3.1.1. People

People are defined at the Portfolio level and can be associated with any level in the application. For the Initial Operating Capability, 200 USDA users have been created into WorkLenz and given appropriate roles. As rollouts continue to the appropriate agencies, additional users will be assigned to the corresponding investments.

3.1.2. Risks

Risks are also defined at the Portfolio level and can be associated with any level in the application. Risks have been created based on the 11 risk assessments from the OMB 300 that all investments must address. The additional 8 risk categories for the IT investments will be tracked as risk metadata. In addition, the 11 risks have been categorized by risk types to allow for analysis and reporting. Once Portfolio risks have been established, the influence that particular Tasks have on that risk can be measured and addressed.

The Portfolio is composed of Programs, which are…

3.2. Programs

The 29 Agencies and Staff Offices that comprise USDA:

- Farm Service Agency
- Foreign Agricultural Service
- Risk Management
- Food and Nutrition Service
- Center for Nutrition Policy and Promotion
- Food Safety and Inspection Service
- Agricultural Marketing Service
- Animal and Plant Health Inspection Service
- Grain Inspection, Packers and Stockyards Administration
- Forest Service
- Natural Resources Conservation Service
- Agricultural Research Service
- Economic Research Service
- Cooperative State Research, Education,
- Rural Business – Cooperative Service
- Rural Housing Service
- Rural Utilities Service
- Office of Chief Financial Officer
- Office of Chief Information Officer
- Office of Communications
- Office of Congressional Relations
- Office of Chief Economist
- Office of Budget and Program Analysis
- Office of Executive Secretariat
- National Appeals Division
- General Counsel
- Office of Inspector General
- Office of Civil Rights

and Extension Service

- ?? National Agricultural Statistics Service

3.2.1. Program Type

The 8 Mission Areas within USDA:

- ?? Farm and Foreign Agricultural Services
- ?? Food, Nutrition, and Consumer Services
- ?? Food Safety
- ?? Marketing and Regulatory Programs
- ?? Natural Resources and Environment
- ?? Research, Education and Economics
- ?? Rural Development
- ?? Departmental Administration/Staff Offices

Each Program is composed of Projects, which are…

3.3. Projects

The 55 major IT investments collected during the data gathering. Going forward, the Project level can also be utilized for import of non-major and non-IT investments within USDA.

3.3.1. Project Type

The 5 CPIC Phases for Major and Non-Major Investments:

- ?? Major Pre-Select
- ?? Major Select
- ?? Major Control
- ?? Major Evaluate
- ?? Major Steady-State
- ?? Non-Major Pre-Select
- ?? Non-Major Select
- ?? Non-Major Control
- ?? Non-Major Evaluate
- ?? Non-Major Steady-State

3.3.2. Project Category

The 6 Portfolio Segments:

- Grants
- Legislative Mandates
- Growth
- Infrastructure
- Enhancements
- Innovation

3.3.3. Project Metadata Fields

1) The 5 Service Areas:

- Administrative Services
- Application Services
- Infrastructure Services
- Core Services
- Component Services

The following examples define the various service areas:

- Administrative Services – HR, Program Management, Enterprise Architecture
- Core Services – Risk Mgt., Cost Mgt., Resource Mgt.
- Application Services – Web, Portal, Media
- Component Services – Databases, System Performance, Automation
- Infrastructure Services – LAN/WAN, Platforms, Mainframes

1) The sponsoring agencies are listed as an additional metadata field to account for investments that have multiple agencies and mission areas. A lead agency is identified at the Program level and additional agencies overseeing a particular investment are available as multi-select drop down. These agencies are mapped to the appropriate mission areas, giving agencies the insight to review all of the investments in which they are involved.

Each Project is composed of Phases, which are…

3.4. Phases

The Phases of the proposed Project plan templates, allowing for functional grouping.

Examples of typical Phases:

- Process Planning
- Alternative Analysis
- Requirements
- Design
- Development
- Testing

3.4.1. Phase Type

A one-to-one mapping of the Phase type to the Phase name enables USDA to compare Phases across investments and agencies.

Phases are composed of Tasks, which are…

3.5. Tasks

The Tasks of the proposed Project plan templates.

Example of typical Tasks:

- Hold Section 508 Compliance Review
- Submit cost goals to CFO for review

The initial Tasks in WorkLenz will be generated from the Project plan templates, which are contained in the WorkLenz template center. Métier referenced the PMBOK, CPIC and OMB Exhibit 300 submissions to create Project plans for each of the five CPIC Phases. These templates include Tasks that map directly to the OMB Exhibit 300 requirements. Investments that utilize these templates will automatically have objective evidence that they are meeting several of the OMB Exhibit 300 requirements.

3.5.1 Task Type

Entities of work:

- Internal Work Product
- External Deliverable
- Milestone
- Work Activity
- Review